FORT ST. JAMES LRMP

TOURISM OPPORTUNITIES ANALYSIS

Prepared For:
The Ministry of Small Business, Tourism and Culture
Tourism Policy and Land Use Branch

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1 INTRODUCTION

Clover Point Cartographics of Victoria has been commissioned by the Ministry of Small Business, Tourism and Culture to identify opportunities for sustainable community-based recreation and tourism development in the Fort St. James Forest District. Working with Clover Point on the project is Meredith and Associates. The study is intended to contribute toward the implementation of the Fort St. James Land and Resource Management Plan (LRMP).

1.1 Purpose

The information obtained will enable senior government to support the efforts of individuals, municipal governments, First Nations, tourism groups and economic development commissions to:

- diversify local economies,
- maintain access to recreational resources for local residents, and
- minimize conflicts among resource users.

As the tourism industry grows, demand for the "Super Natural" experiences that have become the signature tourism product for the province will continue to increase. This study should contribute to integrated resource and community planning targeted towards economic, social and environmental sustainability. In addition to identifying key opportunities for tourism, this report identifies important issues and constraints that threaten the potential for tourism in the study area.

The analysis is not meant to be either exclusive or exhaustive. The study's objective is to identify those products with the best development capability based on a combination of natural resource, market potential and local suitability. The ultimate value of this project is in identifying key opportunities and actions required to assist in the priority-setting of key players in tourism planning, and providing further direction to communities, business people and organizations involved in tourism development in the region.

1.2 Scope and Methodology

There were four overlying objectives for this project:

1. Conduct an inventory of tourism operators, facilities, features, areas of use and infrastructure

   - Build on existing Forest Recreation and Tourism Resource Inventory data
   - Use existing data and previous studies where available
   - Use first hand interviews and surveys of area tourism operators
   - Identify land and resource issues with a bearing on tourism development
   - Provide summary statistics on existing tourism activities
   - Follow RIC standards for Community–Scale (1:20,000) Tourism Opportunity Studies

2. Create predictive models which evaluate the potential of the natural resource base to support defined tourism activities

- Create up to 10 models
- Base models on digital data collected and input from advisory group
- Use existing Ministry feature-based models where applicable
- Modify for local conditions, and based on input from advisory group
- Incorporate constraints where applicable and available

3. Identify tourism opportunities in the region
    - Use latest market research plus information gathered through survey and interview
    - Incorporate results of inventory and modeling
    - Reflect the strengths of the community and area resources
    - Describe tourism opportunities in 10 tourism product areas
4. Incorporate community involvement throughout the study
    - Use local experts (Planning Agencies, Community Groups, First Nations, tourism operators and recreational organizations) as advisory group/steering committee
    - Maintain communication with advisory group/steering committee throughout the project
    - Incorporate local concerns, constraints and issues
    - Prepare tourism development profiles for communities
    - Present results (report and map)

The work plan for this project involved the following key steps:

- Start-up Meeting with advisory group representatives and government agencies in Fort St. James on August 17, 1999. Followed by a familiarization field trip of the study area.
- Review of Previous Studies and summary of tourism opportunities.
- Survey and Telephone Interviews of tourism operators, recreation groups, and agencies to identify information on existing operations and tourism opportunities. Over 65 tourism operators and recreation groups were identified; surveys were attempted with 47 tourism operators. From these, the response rate to the survey was 36%.
- Select Key Tourism Products, with assistance from the advisory committee, from a list of 50 provided by the Ministry (refer to Appendix D for the tourism product selection methodology).
- Data Compilation to collect, update, refine and organize information from government agencies and tourism operators. Map tourism features and facilities in the study area (shown in Appendix D).
- GIS-based Predictive Models of the key tourism products (shown in Appendix D).
- Preliminary Product Report to identify key tourism opportunities.
- Status Report and Maps summarizing process and preliminary results.

- Planning Workshop in Fort St. James on January 13, 2000 to provide information and seek input from operators and the public.
- Detailed Tourism Analysis identifying opportunities and related information in more detail, with specific implementation recommendations submitted as Draft Report.
- Final Report and Data Base incorporating all reports, analysis, and map folios. Digital mapping format to provincial standards.

1.3 Report Structure

There are four main sections to this report, with the majority of analytical detail contained in the appendices.

- **Chapter 3** presents the industry structure, in the context of the provincial and national scene.
- **Chapter 4** has product discussions for fourteen tourism products, including those identified by the Interagency Planning Team as the focus of this study.
- Opportunities and recommendations for the development of the outdoor recreation products considered by this study area appear in **Chapter 5**. Development opportunities are discussed on an area-by-area basis for all the selected tourism products.
- **Chapter 6** identifies the strengths, weaknesses, opportunities and threats to tourism in the Fort St. James Forest District and discusses the issues important to tourism operators. The chapter concludes with tourism development recommendations and 'next steps' that address the various tourism needs and opportunities which require attention in order to ensure that the Fort St. James tourism area moves forward in a positive and proactive manner.

Appendix A provides a *Tourism Product Packaging* background paper and a *Sample Community Survey*, both supporting the recommendations of Chapter 6. Appendix B is a background document on ***Winter Tourism***. Appendix C includes the research and data collection methods. Appendix D discusses the map compilation, existing use mapping and tourism capability modeling. A data dictionary describing the digital map layers can be found in Appendix E.

Looking SE towards Great Beaver Lake from Murray Ridge Photo from David Nicolson

2 BACKGROUND

2.1 Importance of Tourism

The tourism industry is one of the great economic success stories in British Columbia. Tourism British Columbia reports that in 1999 the industry generated over $9.2 billion in revenue, up 4.9 percent over 1998[1]. Revenues are expected to surpass the $9.4-billion mark this year. A record 22.3 million visitors supported 16,500 tourism related businesses in 1999. Almost 113,000 people are directly employed in this sector in the province, not including self-employed workers. Total direct and indirect employment is estimated at about 250,000 individuals. Tourism is the second-largest earner of export (foreign exchange) income in the provincial economy, after wood products.

The forecast is for the steady growth to continue, and there is excellent potential to develop the tourism industry in the study area, as well as throughout the province. Adventure tourism constitutes a major growth sector of the tourism industry -- outpacing every other sector of the Canadian economy. Market demand for the type of experiences offered in the region and throughout British Columbia continues to grow, as baby boomers age and travel more frequently. The desire among a growing urban-based population to experience a natural setting is one of several key trends stimulating this increase in demand.

A study completed in 1998 found that ecotourism in British Columbia generated $892 million in revenue in 1997 and employed more than 13,000 people, an 11-per-cent increase from the previous year[2]. The provincial Economic Council of Ministers has included ecotourism as a key component in provincial economic revitalization and diversification. Another area with great potential is aboriginal tourism. Last year, Tourism British Columbia signed an accord with the Aboriginal Tourism Association of British Columbia to help develop and promote aboriginal tourism products and services.

Ecotourism/outdoor adventure is one of the fastest-growing sectors of the tourism industry. To support development of this sector, the Ministry of Small Business, Tourism and Culture has developed a three-part strategy[3] that:

- Conducts Tourism Opportunity Studies to help assess the potential for different areas of the province to develop an ecotourism industry;
- Designates "Gateway" communities to serve as focal points for the co-ordinated development of an exciting variety of recreational and cultural activities; and
- Works with industry to develop "Best Practices" that will enhance BC's desirability as an ecotourism destination and ensure that international travellers are satisfied British Columbians are protecting their precious natural resources.

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[1] Source of information for this section: Ministry of Small Business, Tourism and Culture web-site

[2] Ibid.

[3] Ibid.

2.2 Tourism and Land Use Planning in British Columbia

In British Columbia community development, tourism, and recreation planning is managed by several agencies. The Ministry of Small Business, Tourism and Culture (MSBTC) has the responsibility to ensure that tourism values and interests are available for, considered and accommodated in provincial, regional and sub-regional land, water and resource planning initiatives and in treaty negotiations. The Ministry of Forests (MoF) is responsible for, among other things, administration and management of recreation on Crown Forest Lands. The British Columbia Assets and Land Corporation is responsible for Commercial Recreation tenures on Crown Lands. BC Parks is responsible for recreational and commercial tourism use in Provincial Parks.

Forest Renewal British Columbia (FRBC) is an independent Crown Corporation that was established to manage and direct investments to renew British Columbia's Forest Economy. Among their objectives is to support forest communities experiencing major job loss. Fisheries Renewal BC is an independent Crown corporation with a legislated mandate to provide all British Columbians -- including First Nations, commercial and recreational fishers, processors, local government, environmental groups, the sports fishing tourism industry and others -- with meaningful opportunities to participate in provincially-led initiatives aimed at protecting fish and renewing the fishery. The top priorities of Fisheries Renewal BC include programs for recreational fisheries diversification and development and community-based fisheries job creation strategies. The Northern Development Commission, established after the October 1997 Premiers Summit on Northern Jobs and Development, has a mandate to establish a long-term vision for enhancing job creating and investment opportunities in Northern British Columbia.

Tourism development planning has traditionally occurred either as regional economic development studies or as site-specific feasibility studies. While each provides useful information, the first does not consider the 'where' question, while the second considers only a predetermined location. A Tourism Opportunity Study (TOS) suggests a way to address the 'where' question across a community-scale region, seeking to identify spatially areas where business-style site feasibility analysis is appropriate on resource and social grounds.

The TOS concept is part of a natural progression for the Ministry of Small Business, Tourism and Culture. Since 1992, MSBTC's Tourism Policy and Land Use Branch as been working to incorporate the tourism industry's requirements into strategic, regional scale land use planning processes. A key tool allowing MSBTC to describe the existing industry and its resource needs has been the Tourism Resource Inventory (TRI).

The TRI uses Geographic Information System (GIS) technology to describe and map the locations of businesses involved in tourism, the resource features of importance, and the routes and areas used by tourism operations. Original information is captured via a survey of tourism operators, supplemented by a variety of other sources, and recorded at a nominal scale of 1:250,000. One key aspect of the TRI is its reliance on data provided by external agencies. A TRI adds value to these datasets through the interpretation of their applicability to tourism products. The TRI also uses predictive modeling to describe the capability of the resource base to support specified tourism products, providing mapping of relative potential across the landscape. Tourism operators are targeted for specific information about operations, and industry leaders are consulted for input on the predictive modeling. However, the TRI is driven by and directed towards provincial management agencies and does not provide adequate detail or appropriate information for sub-regional or community level planning.

The issue of land use planning and its implications for tourism in British Columbia has been an expressed concern for years. At the annual B.C. Tourism Industry Conference held in February 2000, the industry ranked land use and marketing as the two top issues of concern for tourism in the province[4]. Building on the same GIS-based tools as a TRI, a TOS is an information tool that adds a SWOT analysis to incorporate the economic and social priorities of the community. A TOS reflects the current status of local tourism development and provides the detailed information required for sub-regional or community level planning and can be used to identify, develop and promote appropriate, sustainable tourism development opportunities.

2.3 Fort St. James LRMP and Tourism Planning

The Fort St. James Land and Resource Management Plan (LRMP) incorporates approximately 3,170,000 hectares of forest and range land, mountains, rivers and numerous lakes. The boundary corresponds with the Fort St. James Forest District and incorporates the headwaters of three of British Columbia's major river systems: the Fraser, Skeena and Peace.

The focus of regional planning since 1992 has been the Fort St. James LRMP. The Land Use Plan was approved in March 1999. Implementation strategies are being designed and some are already being applied. The Land Use Plan divides the study area into 36 resource management zones based on resource values, existing and potential future economic activity and environmentally important areas. There are five categories of zones, each with a unique set of management objectives and strategies. The plan adds an additional 22 protected areas totaling 187,000 hectares to the five existing Provincial Parks, encompassing 1040 hectares, found within the LRMP study area. Land given protected status amounts to 5.9 percent to the total plan area.

The LRMP area encompasses parts of the traditional territories of the Carrier Sekani Tribal Council (which include the Tl'azt'en, Nak'azdli and Takla Lake Nations), Gitxsan Hereditary Chiefs and the Yekooche, all of whom are at Stage 4 of Treaty Negotiations, and the Tahltan First Nation, who are not in treaty negotiations at this time. Small portions of the Kaska Dena, Lheit'lit'en and Tsay Keh Dene First Nations' traditional territories are encompassed by the Fort St. James LRMP. The study has been conducted without prejudice towards treaty negotiations.

The Interagency Planning Team (IPT) of the LRMP is responsible to provide inventory data, analysis and planning recommendations to agencies mandated with resource management and planning functions in the Fort St. James Forest District. The IPT consists of a committee of representatives from British Columbia provincial agencies, including those described above.

Several tourism and recreation studies have been conducted in the region previous to this project. These include a 1:250,000 scale Tourism Resource Inventory (1996) and Tourism Capability Modeling: Methods Refinement and Application in Support of Treaty Negotiations: Northeast BC (1998). A visual sensitivity map has been produced for the Fort St. James District. Forest Recreation Inventories have been conducted for the Prince George TSA as well as TFL 42. The Prince George Region has also conducted a region-wide Strategic Recreation Plan.

This study was initiated by MSBTC, which in 1999 approached several other managing agencies with an interest in tourism development or management of the natural resources to participate and provide funding assistance. Prototype TOSs were completed for Nootka Sound (1998), North Vancouver Island (Port McNeill Forest District) (1998), Prince George (1998) and the Kalum Forest District (1999). These prior studies did not fully incorporate the economic and social criteria as do the current TOSs. Digital data standards were released for Tourism Opportunity Studies in March 2000. In addition to this study, TOSs are concurrently being conducted in the following Forest

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[4] Council of Tourism Associations

Districts: Cassiar, Robson Valley, Horsefly/100 Mile House, North Coast, Squamish and Campbell River/Port McNeill. A supplemental TOS, incorporating the economic and social analysis, is also being conducted in the Kalum Forest District.

2.4 Study Area Description

Approximately 4000 people reside in the Fort St. James LRMP area, with just over half (2,058) living in Fort St. James. About 45 percent of the population are First Nations peoples. Other, smaller communities include Tachie, Yekooche, Middle River, Takla Landing, Bear Lake, Nak'azdli and Pinchi. Forestry accounts for about 46 percent of area jobs. Mining, trapping, agriculture and tourism account for 20 percent of employment with the remaining jobs found in the government and services sectors. Parks Canada operates a National Historic Park at Fort St. James, highlighting the establishment of a Hudson's Bay Company fur trading post in 1806. Over 76 Forest Service Recreation sites and 10 recreation trails are found in the study area.

The Prince George Timber Supply Area (TSA) makes up the majority of the LRMP area, with the remainder (just over 49,000 ha) incorporated in Tree Farm License (TFL) 42. TFL 42 is controlled by Tanizul Timber Ltd., which is owned by the Tl'azt'en Nation. The Annual Allowable Cut (AAC) for the TSA and TFL were last established in 1996. They are due for re-evaluation in April 2000 and June 2001 respectively.

Looking north towards Pinchi and Tezzeron Lakes from Murray Ridge **Photo from David Nicolson**

3 TOURISM TRENDS AND REGIONAL INDICATORS

3.1 Tourism Trends

Whether one is marketing a tourism destination (such as British Columbia), a specific tourism activity within a destination (such as wildlife viewing or hiking), or simply one or two products within a destination, it is important that one does not market from within a limited scope or target market awareness. It is vitally important that there is an understanding and cognizance of the global, national and regional tourism trends as well as any shifts in travel patterns, purchasing processes or demographics and psychographics as they pertain to a destination's target markets.

The travelling consumer of today (let alone in the future) is very different from any other time in history. The most successful businesses in the travel industry are those that respond to the challenge through the use of technology, innovative marketing programs, better training of staff and by developing a closeness and understanding of its customers/guests. The differences in travel patterns in the next century will be more related to what consumers are seeking in a travel experience than in how they travel.

In *Tourism, Technology and Competitive Strategies*, author Auliana Poon speaks about the changes in consumer behavior and values which are the critical driving forces for the new tourism (Exhibit 1). The new tourist is experienced, more flexible, independent, quality conscious and harder to please.

Exhibit 1: Old and New Tourists Compared

OLD TOURISTS		NEW TOURISTS
search for the sun	⇨	experience something different
follow the masses	⇨	want to be in charge
here today, gone tomorrow	⇨	see and enjoy but not destroy
just to show that you had been	⇨	just for the fun of it
having	⇨	being
superiority	⇨	understanding
like attractions	⇨	like sports
precautions	⇨	adventurous
eat in hotel	⇨	try local fare
homogeneous	⇨	hybrid

Source: *Tourism, Technology and Competitive Strategies*, Auliana Poon.

Travel is no longer a novelty to the new tourist. Studies support what industry executives have been noticing for the last few years. People expect more out of their vacations than they used to and they are more adventuresome. Surveys done by the Canadian Tourism Research Institute indicate a high degree of interest in getaway vacations, ecotourism, cultural tourism and combining a business trip with a pleasure trip.

The most successful tourism businesses are those that respond to the challenge through the use of technology, innovative marketing programs, better training of staff and a genuine understanding of customers/guests. The differences in travel patterns in this new century will be more related to what consumers are seeking in a travel experience than in how they travel. The new tourist is experienced, more flexible, independent, quality conscious and harder to please.

The following is an examination of global market trends which are of relevance (Section 4.2), a review of Canadian & US tourism market trends (Section 4.3), followed by a review of visitor statistics and trends for British Columbia (Section 4.4).

3.2 Global Tourism Trends

In the effort to provide up-to-date and relevant tourism statistics and trends from a global perspective, accessing timely statistics has always been a challenge. Without question, one organization that collects and collates pertinent tourism data is the World Tourism Organization (WTO) and affiliated organizations such as The Travel Research Association (TTRA).

During the past few years a series of dramatic events around the world is changing the global, political and cultural environment in a way that is certain to effect the future growth and prosperity of the international tourism industry. These events include, but are not limited to a new accord between Russia and China; the signing of the NAFTA agreement; the end of apartheid in Africa; the emergence of North Korea as an economic powerhouse; the government liberalization program in India; a cease fire in Northern Ireland; the signing of peace accords between Israel, Jordan and Palestine; an intense civil war in the once Yugoslavia; continuing civil wars in Africa, Southeast Asia and Cambodia, etc.

In the opening days of 1995, there was plenty of good news for the world-wide travel industry. Most economists agree that there is a close correlation between the growth of a nation's economy and the amount of travel generated by its citizens. Today, the economic news from most regions of the world is strongly positive. With most of the world's population living in countries that are showing substantial economic growth, the last half of the 90s' decade should be seen as a bright period in the history of world tourism.

In short, while there are many international issues worthy of serious concern, the overall growth and stabilization of emerging economies bode well for global tourism growth.

Without getting into an intense level of detail, to follow is a brief synopsis of global tourism trends of relevance to the Canadian tourism industry:[1]

- Gross output of the world's domestic and international tourism industry in 1994 was estimated to have reached $3.4 trillion. This includes $2 trillion spent by consumers, $352 billion by governments, $401 billion by business, and capital investment of $693 billion. These estimates indicate that tourism is without doubt the world's largest industry;
- World-wide international arrivals in 1993 increased by 3.4% to 500 million (WTO);

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[1] Somerset R. Waters, Travel Industry World Yearbook: The Big Picture 1994-95, Child & Waters Inc., 1994

- In 1993 inbound foreign visitor arrivals in the United States declined 3.7% to 45.8 million. This was the first decline in nine years. Canadian arrivals were down by 6.9% while arrivals from overseas countries were up by 4.9%;
- In 1993, outbound Americans travelling to foreign countries increased 1.1% to 44.4 million. Travelers visiting Canada were up by 1.5% and travelers to Mexico declined by 5.1%. US travelers visiting other overseas countries were up 7.1%; and
- In 1993 the Americas reported arrivals up 5.3% to 106.5 million, with receipts up 4.7% to $87.5 billion. There was a strong increase in arrivals from Europe.

In addition to the above statistics, how people travel and what people are looking for in travel destinations has been changing on a fairly consistent basis for the past decade. The "greening" of people's attitudes world-wide, leads to the following tourism trends.

Over the next ten years, tourism products and attractions will have to cater to visitors who are more demanding and discriminating, as well as more active and more purposeful in their choice of destination. There will be a shift in emphasis from passive fun to active learning, and the quality and genuineness of visitor experiences will be crucial to future success in a competitive market.

Key shifts in global tourism market trends are summarized below:

- In the long term, the average standard of living in western developed countries will increase, as will the amount of discretionary money available for travel;
- Rising affluence will bring with it increases in the amount of free time available. Longer weekends and increased paid holidays have helped to stimulate expansion in attraction visitation;
- There is a shift in emphasis from passive fun to active learning;
- Activity or special interest holidays are likely to gain at the expense of conventional sightseeing, visiting and other passive experiences;
- There is growing concern about the impact of modern industry, including tourism, on the physical and social environment;
- There is growing awareness of risks to personal health and safety;
- Leisure time will be used more actively, for mental development as well as physical exercise;
- People aged 45 to 64 years of age will be growing significantly in number to the year 2010. In the United States alone, this age group is forecasted to grow by 31% by the year 2000;
- The potential visitor of the future will be: older, more affluent; more demanding; more thoughtful and discriminating; and more active physically and mentally;
- Timeframes for decision-making windows will be smaller. Hence, one-stop-shopping for all-inclusive packages will continue to be appealing; and
- Consumers will increasingly seek low impact tourism facilities, consistent with environmental values and the desire not to contribute to negative impacts.

3.3 Canadian & US Trends

3.3.1 Inbound Travel

Since 1980, Canada has ranked among the top ten international tourist destinations both in terms of overnight visitors and receipts. More recently, between 1985 and 1993, the number of international visitors to Canada grew by 1.7% per annum, while receipts grew by 7.9% per annum. In 1993, tourism contributed $27.2 billion to the Canadian economy and accounted for approximately 592,800 tourism-related jobs. Tourism is Canada's fifth-largest export industry after motor vehicles and trucks, business services and lumber.

Next year when the first of the baby boomers begin to slide into their 50s — the demographic start for two prime decades of leisure travel — tourism is expected to boom.[2] A study by the federal labour ministry estimates that in the next decade, tourism-related employment will grow as a rate almost double that of the rest of the economy, as long as the value of the Canadian dollar does not rise much more than five cents above its current level (based on $0.73 US).

Many countries see Canada as a "hot" tourist destination. Travel to Canada from overseas countries was up by nearly 12% in 1996. Significant increases from Asian countries such as South Korea, Taiwan, China and Thailand of 30-40% annually were recorded. South Korea is already a larger market for Canada than either Italy or the Netherlands.

Of the main inbound markets, Japan is expected to provide the largest increase in pleasure travelers to Canada between 1996 and the year 2000. The Conference Board of Canada forecast for the Canadian Tourism commission shows an increase of 54% from the Japanese market and 12% from the US pleasure travel market.

The US market, Canada's largest inbound travel market, has given a disappointing performance even with the low Canadian dollar, the Open Skies agreement and positive growth in the US economy. In 1996, trips of one night or longer declined slightly when a more than 3% increase was expected. One reoccurring theme from tour wholesalers is that …prices are getting too high for accommodation and food.

Other statistics show that:

- In 1993, some 20.6 million Canadians took trips to other countries and stayed overnight. This was a decline of 5.2% from 1992. Those visiting the US declined 6.9% to 17.3 million. Some 3.3 million Canadians traveled to overseas destinations in 1993, a large increase of 5.3%;
- In 1994 foreign visitors spent $10 billion in Canada while Canadians spent $16 billion travelling abroad, giving Canada a travel deficit of $6 billion;
- Total arrivals of foreign visitors staying overnight in Canada in 1993 increased by 2.3% from 1992 to a total of 15.1 million. Overnight visitors from the US increased by 1.5% to 12 million. Overseas visitors increased 5.6% to 3.1 million;
- In 1993, Canada's world-wide travel receipts from visitor spending totaled $27.2 billion. Of this, $18.4 billion was generated by domestic tourism and $8.8 billion was generated by international tourism;
- All of Canada's primary markets grew in volume in 1994 with the US market up 4.1% and the total overseas arrivals up 11.1%. This is further broken down to show that the United Kingdom is up 2.3%, Japan +18.1%, France +13.4% and Germany +8.2%;
- In terms of revenue, 1994 figures show that of all overseas tourism receipts Japan provided the highest percentage at 17%, followed by the U.K. at 13%, France at 13%, Germany at 11%, other Europe at 16% and other Asia at 16%;

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[2] *For Fun and Profit*, Maclean's Magazine, August 7, 1995.

- During the past seven years, US visitors to Canada have failed to regain the peak of nearly 14 million arrivals in 1986; and
- The US market currently provides Canada with 79% of its international tourists and 64% of its international revenues. The average stay for US visitors is one week.[3]

To encourage more foreign tourists and to help overcome the reluctance of Canadians to travel within their own country, the federal government replaced the Tourism Canada agency with the Canadian Tourism Commission. The commission, a joint government and industry agency, has a budget of about $50 million — up from the last Tourism Canada budget of $14 million — to promote Canada as a tourist destination both at home and abroad.

3.3.2 Canadian Domestic Travel

Recent CTC marketing campaigns directed at *Canadians visiting Canada* are apparently well targeted as the domestic market has shown a rebound in interest in visiting Canada. Conference Board of Canada research shows that there is a high degree of interest among Canadians to visit the coastal and northern areas of the country. This growth in the domestic market has spurred the interest of Canadian tour operators. Many domestic companies are offering new packages aimed at the domestic market. Domestic tourism appears to be on an upward trend that will continue beyond the year 2000.

3.3.3 The Changing Consumer Profile

Population growth, immigration and an aging population will continue to have profound impacts on the travel industry in North America. Canada's population is expected to grow from nearly 30 million in 1996 to
37.3 million by 2011[4]. At the same time, the median age of the population will increase from 35 years of age to almost 39 years of age, reflecting the rapid aging of Canada's population. The segment of the population that will grow the most during the period 1996 through 2011 will be the 55-64 year olds, which will expand by 77%.

3.3.4 Aging Trend a Boom

One third of Canada's population is in the baby boom category. For this reason they heavily influence product and services. As we enter the next century, the aging trend of the population should benefit the travel industry in a substantial way. By the year 2011, the age group of 44-64 year olds will number 10.2 million, up from 6.4 million today. Another group with significant potential during the next decade will be the 75+ age group.

The population in the United States is expected to grow from 264 million in 1996 to 300 million by the year 2010. Like Canada, the population growth will be distributed differently throughout the country. The northeast and northwest of the country, which includes states such as New York,

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[3] Ibid. #1 plus *Canadian Travel Trends and Forecasts*, Tourism Canada, February, 1995.

[4] The Conference Board of Canada, Canadian Tourism Commission & Baxter Travel Group, *Travel Forecast 2000*, May 1997.

Pennsylvania and Maine, will grow at a much slower rate than the rest of the country. States that will record significant growth include Texas (29%), Florida (29%), California (33%) and Georgia (26%).

Canada's tourism marketing program is aimed at the following US age groups: 35-44, 45-54 and 50+. The Canadian Tourism Commission's (CTC) marketing budget directs 65% to the 45+ market in recognition of its size and importance for future travel. Only 20% is allocated for the 35-44 age segment. The growth in these segments coupled with their high propensity to travel bodes well for operators who depend on inbound travel from the United States.

3.3.5 United States Minority Populations: An Opportunity on the Threshold

The more than 70 million consumers who make up the African-American, Hispanic and Asian American markets account for well over $500 billion in spending power according to Marlene Rossman, author of Multicultural Marketing: Selling to a Diverse America. The growth in the ethnic American markets into the next century will be phenomenal. By the year 2050, ethnic groups are expected to represent almost half of the population in the United States.

Tourism operators have increasingly focused on capturing ethnic markets. Compared with all travelers, the US Travel Data Centre reports in The Minority Traveler that this group spends more on their average trip, are slightly more likely to stay in commercial accommodation and have a higher propensity to shop during a trip.

To succeed in the US market in the next millennium, it is clear that tourism operators will increasingly need to appeal to the fast growing ethnic population.

3.3.6 The Changing Family Structure

In both Canada and the US, family structures are changing rapidly. North American sectors of the travel industry that market to "traditional families" are finding more competition than ever. This should come as no surprise — it is simply becoming a smaller demographic group. Increasingly, families are more diverse and less child oriented.

Family households whose head is less than 35 years of age will make up just 15% of family households by the year 2016. This represents a decline from nearly 26% in 1991. "Young family" households will decline from 1.9 million to 1.5 million during this time period. Most important will be the need for operators to differentiate themselves from their competition in the travel products they provide.

3.3.7 Empty Nesters Looking for Adventure

The year 2036 marks the time when the trailing edge of the baby boom reaches age 65. Until the year 2016, the baby boom generation will move from the "young family" part of their lives to becoming "empty nesters". Mortgage — and kid-free, this group will number nearly 34% of family households by the year 2016. Already numbering 1.5 million today, empty nesters will grow by nearly 35% to the year 2016.

The travel industry will be fighting over this lucrative and fast-growing market. Known for their hedonistic ways — pleasure and happiness rule — and willingness to travel afar, this market will be spoiled like never before with a deluge of new products and services to make travel more convenient, affordable and exciting. Having followed a hedonistic lifestyle, these aging baby boomers will expect travel experiences which are not only hassle-free but which add value to their lives and experiences. Romantic, cultural, educational and adventuresome experiences will appeal to them. The "been there, done that" syndrome will drive tour companies to design more exotic and unusual travel adventures.

What was once the domain of the rugged adventurer is now appealing to older travellers who are provided with ecotourism experiences "in comfort". While specialty ecotourism products never produce the same volumes of tourists (and the accompanying economic benefits) as resort tourism, there is a real trend and opportunity for combining the best of both worlds from a destination perspective. The interest in exploring and learning about a destination and its particular natural, cultural and heritage features is not just limited to pre-packaged ecotourism experiences. Once visitors are "on-site" at a destination, interest in exploration (and being guided) is also strong.

3.3.8 Industry Consolidation

It has been estimated that 25% of tour operators account for over 90% of tour operator revenues in Canada. This trend is expected to continue with a possibility of further consolidation occurring. The tour operator industry in Canada changed significantly in the 1990s. The trend toward a small number of large operators and a large number of small niche tour operators is well entrenched on a national level.

3.3.9 Economic Trends Lead Travel Industry

The travel industry in North America will surely prosper thanks to steady growth in the economies of Canada and the United States and what can only be called spectacular growth in Pacific Rim countries. It is expected that inbound and outbound travel between North America and the Pacific Rim countries will continue to grow at double-digit annual increases well into the next millennium. The growth in the middle class in these countries along with improved air access and the easing of visa restrictions will facilitate outbound travel from the Pacific Rim countries. Canada had a 17% increase in visitors from Asia in 1996. However, this does not even compare with South Korea and Thailand, which led the way with increases of more than 41%.

3.3.10 Wealth & Discretionary Spending

As we look into the next millennium, there are a number of factors that will affect Canada's travel industry. Some will be positive while others are going to hurt.

On the negative side, an appreciating Canadian dollar, something that most economists agree will occur, will result in fewer international visitors and more Canadians traveling abroad. This country's low savings rate is another factor that could eventually haunt this highly discretionary industry. With savings cut to the bone and consumer debt at record levels, many Canadians would be left reeling if, as expected, interest rates increase. Spending on travel would take a severe hit in this scenario.

On the positive side, there is a factor that, while difficult to quantify, could provide a timely boost to the industry in the early part of the next century. Put bluntly, the generation born between 1900 and 1940 is starting to pass on. Many people born in this period did very well financially as the value of their houses as well as other assets dramatically appreciated in value. Demographer David Foot estimates that over the next two decades, as mush as $1 ***trillion*** will be handed down from Canadians now over the age of 55. What baby boomers will do with this money is an interesting question.

The travel industry could also gain from this large transfer of money from one generation to another as the industry should receive a good chunk of the inheritance funds based on a combination of demographic trends and how people like to spend their money. With a lot of leisure time on their hands, the demand from baby boomers for leisure activities like travel will expand. Money inherited from their parents will enable boomers to travel even more than they would have hoped.

The case put forward that Canadians want to spend on travel is strengthened by a survey conducted by the Royal Bank in which Canadians were asked about their intended purchases in 1997. The results were analyzed by demographic groupings and compared against a similar survey conducted in 1995. Overall, 67% of respondents picked vacations as their top spending choice for 1997. Travel surpassed making contributions to an RRSP, buying furniture, making other investments and home renovations.

3.4 The Value of Tourism in British Columbia[5]

3.4.1 Expenditures

Tourism revenue totaled $8.8 billion in 1998, a 2.9% increase over 1997. A major component of this growth came from the US market (up 11.7%), whose tourism expenditures injected a total of $2.2 billion into the provincial economy. Positive revenue growth in 1998 was also seen from the BC, Canadian and European markets, up 1.5%, 2.9% and 2.2% respectively. The above revenue increases more than offset a 12.9% revenue drop from the Asia/Pacific region.

Visitor spending among key markets varied with the length of stay and per day expenditures. For example, BC residents represented 49% of total visitor volume last year but only 27% of the revenue as they spend less on average per visit than the longer haul visitor[6]. Conversely, overseas visitors contributed 17% of the total revenue while representing only 8% of the volume.

3.4.2 Target Market Volumes

In 1998, BC hosted 21.8 million overnight visitors — an increase of 1.9% from 1997. Nearly half (49%) of these visitors were BC residents. Travellers from other parts of Canada accounted for 4.7 million visits (21.8%) a 1.5% increase over the previous year. However, because resident travel makes up a significant portion of tourism activity, the numbers can significantly change, depending on the state of the provincial economy.

A strong US economy, a growing awareness of BC as a preferred travel destination and a very favourable exchange rate combined to lure Americans to BC in record numbers in 1998. There was a 10% increase over 1997 and a 29% increase since 1994.

Australia and Hong Kong were the only Asia/Pacific countries to show positive growth in 1998, up 4.8% and 5.3% respectively. Slightly more Europeans visited BC in 1998 (up 1.1%), driven mainly by the 7% growth from the UK market. The number of UK visits topped 238,000, nearly doubling the second largest market of Germany with 129,000.

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[5] Statistics in this section are from: *The Value of Tourism*, an information brochure generated by the TBC Research Services, 1999.

[6] This does not account for any 'outfitting' expenditures BC residents spend in pursuing their various recreational activities (i.e.: equipment, clothing, education & skill development, etc.)

3.4.3 Employment

In 1998, 112,940 people were directly[7] employed in BC's tourism industry, ranking it fifth in provincial employment and ahead of all of the goods-producing (resource-based) sectors. Tourism employment in BC accounted for 7.8% of the total employment in BC in 1998. Growth in tourism employment rose 31% in the ten year period from 1989 to 1998, approaching nearly double the provincial average of 19%.

Half of the jobs in the tourism sector are in two hospitality industries: accommodation (27,430) and food and beverage service (29,460) industries. Retail trade (21,680) is the third largest employer, followed by the transportation industry.

3.4.5 Tourism GDP

Quantifying the "tourism industry" is difficult because it is comprised of many activities with purchases from a variety of industries. BC Stats has been estimating tourism sector GDP (the "value added" – the difference between the cost of the material inputs necessary to create a product or service and the price at which it is sold) since 1991. Based on a 1992 constant dollar, Tourism GDP rose 1.2% in 1997, over the previous year, to a total of $4.1 billion. Tourism accounted for 4.8% of the provincial Total GDP of $86 billion. When compared to resource-based industries, Tourism's GDP in 1997 was greater than mining, agriculture and fishing and behind forestry. Based on its contribution to GDP, tourism was the tenth largest activity in BC. Tourism GDP grew significantly in the five-year period from 1992 to 1997, up 15%.

3.4.6 Tourism: The Importer of the Exporting Sectors

Whereas traditional export industries ship commodities to markets in other countries, in tourism the consumers travel to BC to purchase the product — *Super Natural BC.* In 1998, $3.7 billion of BC's tourism revenue was earned in foreign exchange. This was an increase of 4% from 1997, and a 55% increase since 1994. Last year, tourism was the second-largest earner of export income in the provincial economy, after wood products.

3.5 Regional Tourism Indicators

While there is no formal, on-going accounting for tourism statistics and/or trends either within the immediate study area, the following tourism trend indicators pertain specifically to the Fort St. James Forest District and Northwestern BC — as provided by local tourism operators and professional experience.

- Group travel throughout the Northwest region of BC is substantially down while the FIT market (independent traveller's utilizing a personal vehicle) appears to be growing. This supports global tourism trend analysis, which states that people are more and more seeking travel experiences that allow them to explore when and where they wish.

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[7] If indirect employment is factored in, total direct and indirect employment has been estimated at about 250,000.

- The uncertainty regarding land-use policies is limiting growth in the private tourism sector (i.e.: the ongoing revising of the Commercial Backcountry Recreation policy, the uncertainty of local First Nations land claims process & the uncertainty of resource use management regimes).
- Visitation to local Tourism InfoCentres appears to be stable.[8]
- Many tourism operators are expanding the types of travel experiences they are offering. For example, many fishing guides and charter operators are diversifying their products to include soft adventure opportunities.
- The continuation of a recession climate in BC will have direct and dramatic effects on the local & regional tourism industry.[9]

3.6 Regional Industry Profile

This study has identified 65 tourism operators who utilize the district land base in undertaking the delivery of tourism products and/or services. While most of these operators are home-based in the district, a small number of tourism suppliers are based outside of the forest district but utilize the natural resources of the area as outdoor activity trip destinations. Existing tourism operators in the Fort St. James Forest District consist of licensed guide-outfitters, licensed fishing guides, destination lodges, front country hotels, motels and restaurants, adventure/ecotourism/heritage & culture guiding operators, and the supporting retail and service sectors.

Tourism businesses are categorized in an effort to determine the characteristics of infrastructure and resource dependency of the operations. The user survey applied for this project asked businesses to identify their primary type of business. The Ministry of Small Business, Tourism and Culture tourism operator database, updated as a component of this project, identifies the following as the mix of tourism operators. Full table summaries can be found in Appendix C.

Accommodation only..	20
Guide-outfitter with overnight accommodation..............	11
Guide-outfitter without overnight accommodation..........	17
Tours/Experiences only...	8
Air Charter..	5
Ski Facility..	1
Golf Course..	1

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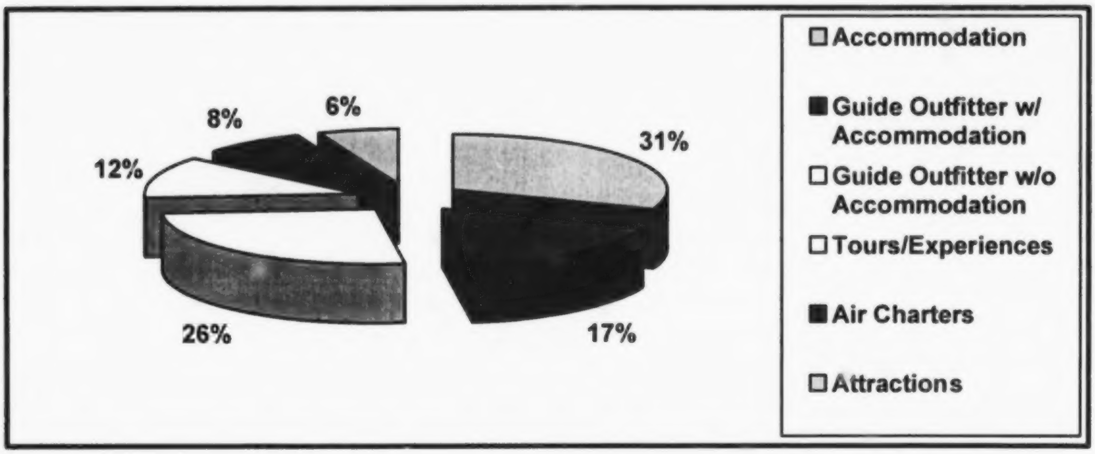
[8] this observation must be qualified as funding formulas tied to visitation numbers has led many InfoCentres throughout BC to "pad" visitation numbers in order to retain historical funding levels.

[9] about 45% of all provincial tourism revenues are generated by residents of BC. With many residents suffering from the recession, spending on BC holidays and recreational equipment will continue to decline.

Museum…………………………………………………..	1
Other……………………………………………………....	1
Total	65

Exhibit 2: Tourism Business Types in the Fort St. James Forest District



View map 1 – tourism facilities and features

Research for this project has shown that tourists are attracted to the area for a number of reasons, including:

both resident and non-resident FIT (fully independent travel) targeted at touring, sightseeing and wildlife viewing

Fort St. James National Historic Site

both guided and non-guided (BC resident) hunting opportunities

cultural and heritage products

fresh water canoeing/kayaking/rafting experiences

en route to Alaska &/or the Yukon

back road 2x2 & 4x4 touring

winter activities such as ice fishing, snowmobiling, cross country, back country & downhill skiing

group tours generated outside the region

fresh water fishing opportunities available throughout the district

hiking and trekking opportunities

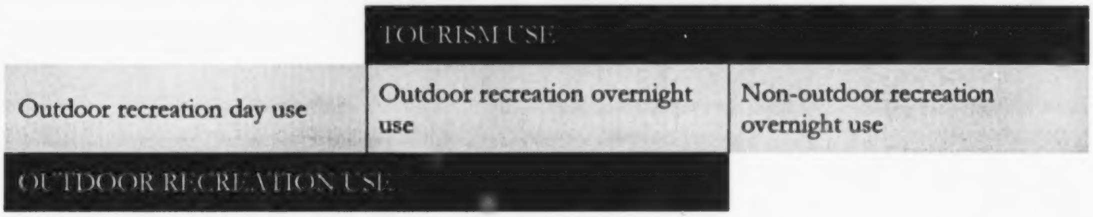
summer camping & outdoor activities

unique natural features

3.7 Outdoor Recreation & Tourism

Tourism and outdoor recreation use are often mentioned together and at times are used interchangeably. While there is a definite overlap between the two terms, there is a difference. A tourist is usually defined as someone (or a party) travels more that three hours from their place of residence and therefore, usually spends an overnight away from home. Tourism use, therefore, includes (and overlaps with) overnight outdoor recreation use by both BC residents and non-residents visiting the province. This overlap is shown in Exhibit 3 below:

Exhibit 3: Components of Outdoor Recreation and Tourism Use


TOURISM USE
Outdoor recreation day use
Outdoor recreation overnight use
Non-outdoor recreation overnight use
OUTDOOR RECREATION USE

Many outdoor recreation trips are just for the day. These day users are considered "excursionists" rather than "tourists". BC Parks notes that about 87% of provincial park visits are day use. A survey by the BC Ministry of Forests and BC Ministry of Environment, Lands and Parks (1994) found that about 34% of the wilderness trips taken by BC residents were just for the day.

3.7.1 Outdoor Recreation in Forest Lands

BC resident use in provincial forests in 1993 was estimated to be about 45 million visitor-days; non-resident outdoor recreation use was estimated at eight million visitor-days[10]. About two-thirds of all BC resident outdoor recreation in provincial forests occurs in areas accessible by road. About 35 million visitor-days of outdoor recreation use in roaded areas and about 18 million visitor-days in roadless (backcountry) areas is therefore estimated in provincial forests in 1993.

About 60% of all recreation use on Crown land is estimated to occur in provincial forests; and about 40% of use occurs in national, provincial and regional parks. Total actual expenditures for outdoor recreation on Crown land is estimated to be nearly $4 billion per year, with BC residents accounting for about 80% of those expenditures. Annual net economic value of outdoor recreation on Crown land is estimated to be nearly $1.5 billion, with BC residents accounting for about 74% of this value.

3.7.2 Outdoor Recreation Trends

Participation in outdoor recreation can change over time due to a variety of factors, including: population change which affects the number of potential participants; and demographic change, such as age, education and income, which affects participation rates.

Participation rates decline for most forms of outdoor recreation with increased age. The median age of the Canadian population is expected to rise from 33 years in 1991 to 41 years by 2011 and similar

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[10] BC Ministry of Forests. 1991b. Outdoor recreation survey 1989/90: how British Columbians use and value their public forest lands for recreation. Victoria, BC. Cited in: Forest, Range & Recreation Resource Analysis, Ministry of Forests, 1994.

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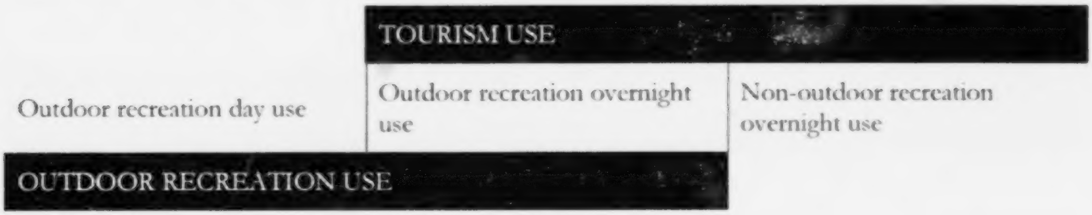
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Participation rates decline for most forms of outdoor recreation with increased age. The median age of the Canadian population is expected to rise from 33 years in 1991 to 41 years by 2011 and similar changes are expected for BC. This suggests that participation rates for outdoor recreation may drop in the future.

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[10] BC Ministry of Forests. 1991b. Outdoor recreation survey 1989/90: how British Columbians use and value their public forest lands for recreation. Victoria, BC. Cited in: Forest, Range & Recreation Resource Analysis, Ministry of Forests, 1994.

Other trends, most notable increases in education and income, are expected to increase participation rages in outdoor recreation. The proportion of BC adult population with some post-secondary education should rise from 46% in 1992 to 57% in 2003 and an increase in total per capita personal income is projected from 1993 to 2003. These trends in education and income suggest a possible increase in participation rates for outdoor recreation.

Tchentlo Lake Photo from David Nicolson

4 PRODUCT DISCUSSIONS

4.1 Value Chain Analysis

This section uses the value chain as a way to summarize and highlight key success factors and best practices for outdoor adventure tour operators. Throughout the value chain, an operator should seek opportunities to drive down costs and to increase differentiation and uniqueness. Successful operators will strive for a consistent and competitive price/value relationship in order to maximize their profit potential.

The value chain consists of the following categories of activities:

Primary Activities

Directly involved in the creation and delivery of the tourism product including sales and after-sales service.

Inbound Logistics includes warehousing, materials handling, inventory control, etc. In the case of tourism, this includes getting the customers to the site of the service.

Operations are the activities that transform inputs into finished products (eg machining, testing, packaging, equipment maintenance, etc).

Outbound Logistics includes the activities that store and distribute products to buyers (eg warehousing, delivery vehicle operations, order processing, etc).

Marketing and Sales are the activities that provide the means for the buyer to purchase (eg advertising, sales force operations, selection and management of distribution channels, etc).

Service includes activities that enhance or maintain the value such as installation, repair, parts supply, rentals, etc).

Support Activities

Support primary activities and other support activities.

Firm Infrastructure broadly encompasses general management activities, as well as legal, corporate affairs and quality management. Often viewed as an overhead, these can be a considerable source of advantage (e.g. skilful negotiations with regulatory bodies).

Financial Management includes the raising of capital and financing of day-to-day activities as well as accounting.

Human Resource Management includes the recruitment, hiring, training, development and compensation of all personnel. Partly centralized but increasingly dispersed, the skills and motivation of employees and the costs involved may be critical to competitive advantage.

Technology Development includes engineering and process development. The function is broader that of defined by traditional research and development. While usually associated with an engineering or development function, is also dispersed (office automation, telecommunications, etc).

Procurement specifically refers to the function of purchasing not to the purchased inputs themselves. While raw materials procurement is usually concentrated in a purchasing department, other purchasing is often dispersed throughout a firm (temporary office staff, hotel and travel

expenses, office equipment and even strategic consulting).

More on Table 4-1.

4.2 Select Product Profiles

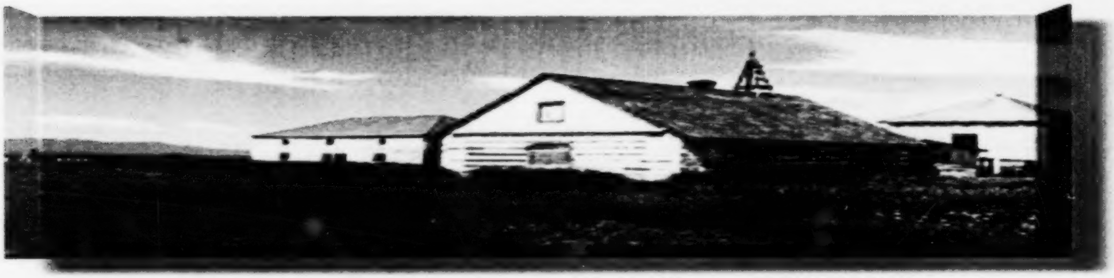
There are 14 product profiles covered in this chapter. The purpose of the profiles is to give readers some understanding of the issues surrounding business development. This section takes a business focus by assessing other inputs an operator requires in order to create a competitive and successful commercial recreation venture.

1. Freshwater Fishing	2. Hiking/Backpacking
3. Lodge/Resort	4. Mountain Biking/Touring
5. Wildlife Viewing	6. River Kayaking
7. Snowmobiling	8. Nordic Skiing
9. 2x2 Touring	10. Culture Interpretation
11. 4x4 Auto/ATV Touring	12. Hut-to-Hut Touring
13. Mountaineering/Climbing	14. Dog Sledding

Each product profile consists of the following sections:

- Customer Profile/Market Segmentation – Successful business development implies successful marketing, which itself is premised on understanding target markets. Each product is assessed from a number of different dimensions so readers are aware of the important characteristics of each market.
- Key Trends and Issues - Trends and issues that may have a direct or indirect impact on product development.
- Product Components and Key Success Factors - Key success factors and levers for success are identified for each product component.
- Typical Operator Characteristics – Data on firm structure is presented to give readers a sense of operating scale.
- Case Examples of Best Practices - One or more cases that demonstrate best practices in business or community development are presented.

Readers are reminded that the following profiles are general in nature. Further assessment and planning is required to determine the actual feasibility of product development in the Fort St James LRMP Area.



Fort St. James Photo from: www.parcscanada.gc.ca/schoolnet/pcimages

4.3 Freshwater Fishing

This profile covers any guided sport fishing that occurs in streams, rivers, ponds or lakes. Freshwater fishing was the fifth most popular sport in the US with 45.8 million people participating in this activity at least once in 1998.[1] In Canada, the participation rate in 1996 for recreational fishing (both freshwater and saltwater) was 17.7 percent and in BC, 17.5 percent.[2] Participation rates in the Lower Mainland of BC were projected to increase by 13 percent from 1993 to 2003.[3]

Freshwater fish commonly found in BC include trout, char, salmon, steelhead and bass. The provincial government regulates freshwater fishing for all species excepting salmon, which is under the jurisdiction of the federal Department of Fisheries and Oceans.

4.3.1 Customer Profile/Market Segmentation:

4.3.1.1 Overall Demographics

According to a 1988 study in Canada[4], the customers of freshwater fishing lodges were:

- More likely male (64%).
- Generally older, mainly between the ages of 35 and 54 (42%).
- Travelled with family (38%) and in couples (30%).
- According to a 1995 US study[5], freshwater fishing participants were:
- Mostly below the age of 50 (78%) with the largest age segment being between 30 and 39 (26%).
- More likely male (63.5%).

In the US, sport fishing participation saw relatively stable participation numbers from 1991 to 1996, declining from 35.6 million to 35.2 million participants, while spending in the sport increased by 36 percent.[6] This is an indication of the increasing affluence of fishing participants.

4.3.1.2 Casual Angler versus Sport Fisherman

The casual angler values easy access to the fishing venue, the lodge accommodation and settings, and other activities offered during the stay. This segment is more likely to consist of families and couples. The casual angler will more likely require basic instruction beforehand.

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[1] "America's Top 25 Participation Sports According to New Superstudy Statistics", Sporting Goods Manufacturers Association, April 1999.

[2] The Importance of Nature to Canadians: Survey Highlights, Environment Canada, 1996.

[3] Future Participation Rates for Outdoor Recreation Activity in BC's Lower Mainland, p.2, ReThink (West) Inc., 1994.

[4] Fishing Lodges and Resorts in British Columbia: Marketing and Development Initiatives, DPA Group Inc., March 1988.

[5] National Survey on Recreation and the Environment, Outdoor Recreation Resources Review Commission, 1994-95.

[6] The Province, January 5, 1998.

The sport fisherman values the opportunity for excellent fishing and guiding services. This market segment looks for remote, wilderness-like settings with high quality fish and few other participants. The sport fisherman is willing to pay more for the fishing experience than the casual angler and will base the decision firstly on the quality of fishing. The sport fisherman will also likely bring his (or her) own fishing gear and tackle.

4.3.1.3 Local versus Overseas Visitors

In general, overseas visitors are serious sportsmen looking for fishing in a remote wilderness area with restricted access. Given the longer distance travelled, overseas visitors will take longer trips and be willing to pay more for an exclusive, once-in-a-lifetime experience. Local visitors will take more trips throughout the year, and may engage in more unguided fishing trips once becoming familiar with an area.

4.3.2 Key Trends and Issues

Issue/Trend	Implications
Ecotourism continues to grow in popularity.	Fishing lodges will need to support activities other than fishing that are non-consumptive. They will need to be developed and operated in such a way as to minimize the environmental impact. This includes adopting catch-and-release and following a "green" code of conduct.
Increasingly, in order to conserve fishing stocks, catch-and-release rules (using barbless hooks) are being implemented. Canadian resorts generally follow stricter catch-and-release standards than required by law.	Fishing tour operators will need to be aware of the regulations as well as ensure that they are being followed for all their trips. The operators can use photographs to record catches as well as emphasize the overall experience to their customers rather than simply the catch itself.
Fishing is restricted to a set season as per the angling regulations set by the Ministry of Environment, Lands and Parks. As well, since 1998 the Department of Fisheries and Oceans has had restrictions on Coho and Chinook salmon, which can be found in BC's rivers as well as the ocean.	Fishing lodges may need to look at diversification into other activities to mitigate short fishing seasons that leaves lodge operators susceptible to cashflow problems.
Other activities competing for many of the same demographic market as freshwater fishing are becoming increasingly popular, such as golf.	Fishing lodges will need to develop diverse features to compete effectively against other recreational activities. This includes additions such as conference/meeting facilities to cater to the business segment, and perhaps including golf as an activity available from the lodge.

Issue/Trend	Implications
Freshwater fishing is becoming more of a family activity.[7]	Fishing tour operators will need to cater to this segment, particularly in offering instruction and guiding for children as well as adults. Other activities that can be enjoyed by families should also be offered to attract this market to a lodge facility.
Land use permits around lakes are difficult to obtain. There is increasing potential for conflict with logging and mining companies, as well for operations not sanctioned by First Nations people.	Without tenure for a lodge and fishing area and co-operation from key groups such as resource companies and aboriginal groups, development of such facilities/areas will be limited.

4.3.3 Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Fishing	Pristine yet accessible area. Scenery. Weather. Quantity and size of fish. Ease of catching fish.	Selecting an area that, aside from the lodge and facilities, is undeveloped. Gaining restricted access to fishing area through tenure. Developing and following guidelines for conserving and/or increasing the fish stock.
Fishing Equipment	High-quality equipment and boats. Appropriate bait for the species of fish and area.	Purchasing and maintaining high-quality gear, tackle and boats. Hiring knowledgeable guides who are familiar with the fish in the area.
Instruction	Lessons from beginner to advanced, if targeting families and couples, instruction for children and women.	Hiring knowledgeable, personable guides/instructors.
Guiding	Knowledge of fish and peak fishing times. Knowledge and interpretation of natural and cultural features in the area.	Hiring and retaining knowledgeable, experienced and personable guides. Following fishing regulations and responsible use of the area. Emphasizing the overall experience, not

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[7] Trends in American Fishing, Bass Anglers Sportsman Society, 1994.

Product Component	Key Success Factors	Levers For Success
	Knowledge of fishing regulations.	just catching fish. Using experience and technology to track best fishing locations and times.
Packing and Freezing	Service for out-of-town and overseas customers. Adequate freezer space.	Providing quality service on the premises and full shipping information and services for overseas guests.
Other Activities	Wide variety, if targeting families and couples including activities such as wildlife watching, hiking, trail riding, canoeing, and kayaking.	Identifying a target market and then developing an appropriate program of activities suited to that market.
Food and accommodation	Privacy. Ambiance. Minimal impact on environment.	Selecting a remote, scenic location with controlled access. Following strict environmental principles in building and operating the lodge and developing a code of conduct to be followed by both staff and guests. Designing the building so that guests are allowed privacy and also common areas that encourage interaction amongst guests. Adding amenities (such as a sauna) that add to the enjoyment of the overall experience.
Transportation	Ease of access to and from major centres.	Arranging for transportation to/from the airport for longer trips, and from major centres for all trips.

4.3.4 Typical Operator Characteristics

A 1988 report revealed the following profile for freshwater fishing lodges in BC:[8]

Typical length of trips in days	3 to 7
Average number of employees	4.6
Gross revenue per operator	$103,000

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[8] Fishing Lodges and Resorts in British Columbia: Marketing and Development Initiatives, DPA Group Inc., March 1988.

Total capital stock	$401,000

A comparison between freshwater and saltwater fishing lodges showed that saltwater fishing lodges were more likely to have upscale amenities such as lounges, restaurants, and hot tubs whereas boat rentals and alternative activity offerings were significantly more common at freshwater lodges.

4.3.5 Case Studies of Best Practices

4.3.5.1 Case Study #1: Bristol Bay Lodge, Alaska

This lodge in Wood-Tikchik State Park, Alaska has been recognized as one of the best freshwater fishing lodges in North America, particularly for king salmon. It has received an endorsement from Orvis, a fishing and hunting gear and clothing manufacturer that started the Orvis-Endorsed Lodge, Outfitter, Expedition and Guide Program in 1986. This endorsement is an assurance by Orvis that a lodge has excellent service, great fishing and experienced staff. What has made Bristol Bay Lodge (BBL) an outstanding success?

Remote, Scenic Location: After flying in from Anchorage to Dillingham, access is by van on an unpaved road up to Lake Aleknagik and then by boat to the lodge, in an area surrounded by mountains and rivers. Almost all of the fishing areas are less than a half-hour flight away.

Food and Accommodation: Guests can stay in the main lodge or in one of four private cabins generally used by families or pre-arranged groups. The lodge features a sauna and hot tub as well as a bar. Meals are freshly made, with large breakfasts cooked to order and packed lunches. Dinners consist of home baked breads and pastries, soups and fish caught during the day.

Fishing: Each day, the schedule for fishing destinations is posted with details of species available, the guides, time of departure and fishing companions. Everyone has an opportunity to talk to the guides the night before in order to prepare for the following morning. One of BBL's unique features is its out-camps. It offers overnight trips to these camps where BBL has exclusive fishing access. The camps are staffed with a cook and two guides and are furnished with comfortable sleeping tents.

4.3.5.2 Case Study #2: Diversifying from Fishing

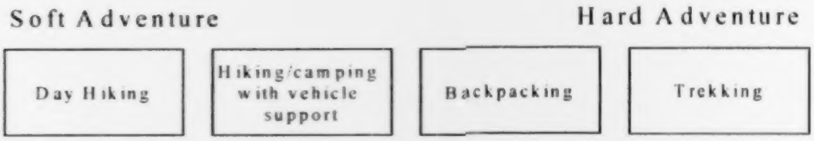
April Point Lodge in Quadra Island, BC began as a fishing lodge in 1950. It offers both freshwater and saltwater fishing, in particular, salmon. In 1998, it was purchased by the Oak Bay Marine Group, a company owning 7 other fishing and holiday resorts.

To diversify from its fishing activity base, April Point added other activities such as kayaking, mountain biking, wildlife viewing and scooter rentals to its offerings. This increased its appeal to families looking for a vacation destination. April Point added golf and tennis to its supported activities and built conference and meeting facilities, allowing it to compete for the corporate customer as well. Thus, by becoming a multi-activity resort, the lodge has reduced its dependence on salmon fishing, which has an uncertain future in BC.

4.3.5.3 Case Study #3: Incentives for Catch-and-Release

King Pacific Lodge is a multi-activity saltwater fishing lodge that has developed unique incentives for its customers to participate in catch-and-release. It is the first Canadian wilderness resort to offer a catch-and-release program. Guests who participate in the program receive a 10 percent discount on accommodation. If they wish to keep one fish, they receive a 5 percent discount. As an additional incentive, those guests who catch and release a salmon over 50 pounds receive a complimentary trip to the lodge.

4.4 Hiking



Of all outdoor recreation activities, hiking has been one of the highest growth in terms of participation in the US. The US market grew by 93 percent from 24.7 million participants in 1982-1983 to 47.7 million participants in 1994-1995.[9] Hiking is often combined with other activities such as wildlife viewing, camping and backpacking, all of which are experiencing increased participation levels. Many surveys combine hiking with backpacking for their statistics. As well, many operators include backpacking and extended trekking under the category of guided hikes. The diagram below shows the range of activities that could be considered under the hiking category:

4.4.1 Customer Profile/Market Segmentation:

4.4.1.1 Overall Demographics

Hikers in Canada have the following characteristics: [10]

- Even distribution across age groups.
- Evenly split between males and females, although backpackers and avid hikers are more likely to be male.
- Travel with friends or in couples.
- Almost all from Canada or US (83.8%).

Geographic Region	Percent of total participants (1993)
BC	39.3
Ontario	9.4
Rest of Canada	23.2
Canada (total)	71.9

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[9] National Survey on Recreation and the Environment, 1994-1995.

[10] Adventure Travel in Canada: An Overview of Market, Product and Business Potential, 1995.

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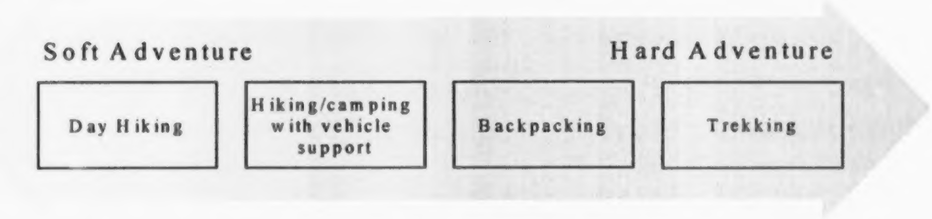

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[9] National Survey on Recreation and the Environment, 1994-1995.

[10] Adventure Travel in Canada: An Overview of Market, Product and Business Potential, 1995.

US	11.9
UK	2.2
France	2.4
Germany	6.7
Japan	1.0

For BC residents, there is a participation rate of 43 percent in day hiking.[11] From other countries, Germany is the largest group.

4.4.1.2 Soft Adventure Traveller versus Hiking Enthusiast

Hiking enthusiasts participate frequently and are more likely to take trips on their own. Since many hiking trails are well-marked and documented through guidebooks, hiking trip operators must provide additional value to these type of customers either through a high-end experience (not only the hike but interpretation, meals and lodging) and/or adding in other desired activities which they cannot do on their own.

Most participants in hiking tours tend to be well-travelled, educated and single, although the family and friend market is growing.[12] Many of them become repeat clients – an important point for tour operators as it implies the need to provide a variety of trips including custom trips for repeat customers. These hikers look for a trip combined with cultural, heritage and other nature-oriented activities such as wildlife viewing.

Based on this view of the hiking market, operators can either target the soft adventure traveller who seeks a high-end, fully-catered product delivered in a safe, comfortable environment that includes comfortable lodging, or the hiking enthusiast that prefers a more participatory, physically demanding experience. Hiking enthusiasts prefer to hike on their own and participate in a tour only if it involves a significant interpretive component or hiking across unknown/unmarked terrain.

4.4.1.3 Destination versus Activity

Destination-based decision-makers are those who seek a variety of activities in a given area, which may include day hikes or shorter overnight trips. The decision of when and where to hike specifically is made after arriving at the destination. They are also very interested in the lodging/accommodation at the destination, which may serve as their "home base" for the duration of their stay.

Travellers who have based their trip on a participating on a particular hiking tour will generally go on longer and more intense hikes, such as the West Coast Trail, with a well-planned itinerary.

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[11] Major Parks Plan Study – Final Report and Conclusions, p.28, Greater Vancouver Regional District, November 1995.

[12] Nova Scotia Marine Tourism Study Final Report, p.64, The Economic Planning Group of Canada, December 1997.

4.4.1.4 Fitness versus Nature Enthusiast

Hiking has become a popular way of improving one's fitness while enjoying the outdoors. Hikers who value the fitness benefit will seek more difficult hikes. The nature enthusiast values the enjoyment of the surrounding environment and will prefer soft adventure tours that include interpretation and education.

4.4.2 Key Trends and Issues

Issue/Trend	Implications
The growing popularity of camping, especially tent camping, by 17 percent from 1987 to 1997 in the US.[13]	This suggests that overnight trips will be increasingly popular, particularly for the hiking enthusiast market segment. The increase in demand for overnight itineraries will create advantages for those areas with high scenic, natural and recreational resources. It will also create opportunities for a hut-based product.
Increasingly, operators are offering specialized tours or specialize completely in a specific market segment such as women only, seniors or at-risk youth. Spa resorts target the fitness enthusiast with rigorous hiking followed by relaxing massages.	Although hiking appeals to a wide range of people demographically, it is important to identify specific target markets and their distinct needs. Tour operators can differentiate themselves by catering to a specific target market, rather than attempting to provide trips with broad appeal. This will require more sophisticated and well-planned market programs.
Parks are a main attraction for hikers, especially Europeans. But development in park areas in North America is being subjected to more scrutiny by government, environmentalists and recreational user groups. The key issue is balancing accessibility with preservation of the environment.	Tour operators must demonstrate the minimization of impact on the environment and other users as well. They will need to be much more actively in the preservation of the local environment in order to gain acceptance. At the same time, public pressure to reduce in-park development will create opportunities for trail development on non-designated Crown land.

4.4.3 Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success

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[13] Sports Participation Trends Report 1997, American Sports Data Inc., 1998.

Product Component	Key Success Factors	Levers For Success
Trails	Difficulty rating appropriate for the participants. For soft adventure travellers, this means well-developed, relatively easy trails, in an uncrowded and pristine environment.	Communities can develop trail systems that have various levels of difficulty. More difficult trails can be developed in consultation with tour operators. Operators who can leverage public trail infrastructure can reduce their operating costs.
Destination	Interesting features for nature and/or culture for day trips. For overnight trips, good camping or hut location.	Developing trails that take advantage of key features in the area. Developing camping areas that minimize the impact on the surrounding environment. Working with local recreation groups on user-group agreements to avoid conflicts.
Guiding and instruction	Knowledgeable, articulate and interesting guides who know both the routes and natural environment. Showing concern for the environment. Instruction relevant to the area, such as bear awareness.	Hiring guides who are both knowledgeable and personable. Teaching participants how to minimize impact when hiking and camping in wilderness areas. Developing good routes for trips, including contingency routes in case of poor weather conditions or other parties.
Food	Exceed the expectations of participants – gourmet meals for the affluent soft adventure tourist. Providing plenty of food given the level of physical activity.	Providing a unique, delicious set of meals that the trips will be remembered for. Finding out about dietary restrictions and preferences of participants before the trip and developing a meal plan accordingly.
Accommodation	Adequate and comfortable shelter against the elements. Clean and in good condition. Catering to the preferences of the participants – soft adventure travellers will prefer lodges while the enthusiast may prefer tents.	Setting expectations and ensuring participants are prepared for any conditions that may arise. Ensuring accommodation/campsites are planned and reserved (where possible) ahead of time to ensure availability.
Support	Providing the level of support desired by the participants. For soft adventure, this means vehicles, guides and/or pack animals carrying	For soft adventure, this requires detailed planning to ensure that adequate supplies have been packed and that these will be readily available as required (mealtimes,

Product Component	Key Success Factors	Levers For Success
	the majority of the gear. For enthusiasts, minimal support is required.	arrival to campsites).
Transportation	Convenient transportation to and from major centres.	Arranging for transportation to/from the airport for longer trips, and from major centres for all trips.
Interpretation and other activities	Activities which add an educational and recreational component such as nature interpretation and wildlife viewing and photography.	Hiring trained interpreters/guides who are experts in the area and interact well with people. Using specialists who can provide in-depth knowledge for activities (e.g. wildlife viewing). Keeping the knowledge of interpreters current. Being involved in local conservation and research efforts.

4.4.4 Typical Operator Characteristics

Canadian tour operators offering hiking as the major activity had the following characteristics in 1993:[14]

Average length of trips in days	6.1
Average number of employees	4.8
Gross revenue per operator	$167,351
Average gross margin	6.9 %

4.4.5 Case Examples of Best Practices

4.4.5.1 Case #1: A Comparison of the West Coast Trail versus Golden Ears in BC

The purpose of developing hiking areas is to provide accessibility to nature for people to enjoy. However, this must be balanced with the need to protect and sustain the environment being made accessible. Here we look at two different hiking areas from an infrastructure rather than commercial perspective. The two areas being examines are taking different directions in providing access as they are serving two different market segments within the hiking population.

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[14] Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p.31, 1995.

The West Coast Trail

This world-renowned hike in BC's Pacific Rim National Park stretches 75 kilometres along the coast of Vancouver Island and is a rigorous 7-day excursion. In 1990, the trail saw 9,359 hikers with increased usage projected. Rather than make the trail more accessible, the number of hikers was limited to 8,000 per season (May to September) or 26 hikers per day.[15] Hikers must be experienced to do this hike, and are less likely to use a commercial guide. Information packages are provided to those who secure permits for the trail to ensure that hikers know what to expect throughout their trips. The trail includes boardwalks, ladders, bridges and cable cars that are maintained regularly. However, no effort is being made to make the trail more accessible to less experienced hikers.

Golden Ears

A new BC Parks trail in Golden Ears has been promoted as a model of accessibility. This area now has easy access – flat, hard-packed gravel trails and raised boardwalks allow access to wheelchairs.[16] Sound boards have been installed for the hearing-impaired, sculptures of slugs, plants, animals for the blind and benches every 400 meters for the elderly. Signs and audio stations are available in several languages that provide descriptions and interpretation of the local area and its people, the Katzie First Nation. The area has a new washroom facility and a paved parking lot and there are plans to build 71 new campsites.

4.4.5.2 Case #2: Canadian Mountain Holidays, Banff, Alberta

Canadian Mountain Holidays (CMH) targets the inexperienced hiker wishing to access the high alpine for a challenging experience with the comforts of an upscale lodge and gourmet meals. CMH uses helicopters to offer easy access to alpine hiking with beautiful scenery from its own lodges acting as a home base for the week. It has placed a premium on customer service in order to attract and bring back customers.

Meeting the Needs of Each Participant

CMH does not establish its itineraries and tour groups until after everyone has spent a day in the lodge area. A preliminary information form filled out by participants gives the guides an idea of each participant's hiking ability. The first day, however, is used to further assess the ability level of the participants and then to ensure that the groups are set to maximize the enjoyment of guests. The guides play a critical role in performing this assessment – they may even suggest that a guest try a more difficult hike for someone who may have underestimated his or her own ability. From that point on, the guides will get a sense from the group what is important to them, and adjust the itinerary accordingly.

Taking Care of the Customer Beyond the Tour

CMH has introduced their Vacation Planning Service, which provides one-stop travel arrangements for its customers. This service provides full reservation services for transportation and accommodation upon their customers' arrival into Calgary International Airport. This is highly valued by international visitors who are looking for a worry-free vacation without the hassles of arranging their own logistics from abroad.

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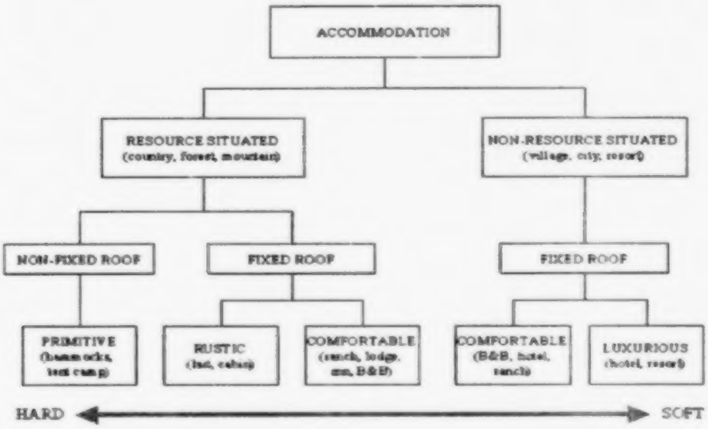
[15] "Reservations ease congestion along the West Coast Trail", Vancouver Sun, E7, October 31, 1992.

[16] "Universal access trail opens in Maple Ridge", Vancouver Sun, B4, October 14, 1998.

4.5 Lodge / Resort

The focus of this profile are lodges and resorts (referred to as lodges for simplicity's sake) that are in remote, backcountry locations or that are "resource situated":[17]


ACCOMMODATION
RESOURCE SITUATED
(country, forest, mountain)
NON-RESOURCE SITUATED
(village, city, resort)
NON-FIXED ROOF
FIXED ROOF
FIXED ROOF
PRIMITIVE
(hammocks, tent camp)
RUSTIC
(hut, cabin)
COMFORTABLE
(ranch, lodge, inn, B&B)
COMFORTABLE
(B&B, hotel, ranch)
LUXURIOUS
(hotel, resort)
HARD
SOFT

Lodges can vary from comfortable, high-end accommodation to the more rustic. They can be either marine or land-based supporting outdoor adventure activities, including hiking, mountaineering, fishing, hunting, wildlife viewing, snowshoeing, and nordic skiing in remote areas. Lodges offer private accommodation through separate quarters or cabins, as opposed to huts, which generally offer shared sleeping quarters. Front-country lodges, which are commonly targeted towards people looking for access to trails for day trips, are not considered in this discussion.

4.5.1 Customer Profile/Market Segmentation

4.5.1.1 Overall Demographics

Demographic growth in key markets indicate an increasing demand for this product, in North America and internationally. However, because a resort holiday usually implies higher levels of spending, the product appeal is relatively narrow within the overall outdoor adventure market. The demographics for a particular lodge will depend on the type of activities it offers and the experience level required to participate in these activities supported by the lodge.

4.5.1.2 Soft Adventure Traveller versus Activity Enthusiast

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[17] "Greening of Remote Tourism Lodges", Pam Wight & Associates, 1993.

The soft adventure traveller looks for a lodge that will provide the best overall "experience". This includes a combination of the accommodation, food and activities offered that are high-end and/or unique. The activity enthusiast will select a lodge based on its location and support for a particular activity. This is particularly relevant for activities such as fishing or backcountry skiing, which are highly dependent on having particular resources, features and conditions.

4.5.1.3 General Consumer versus Experienced Ecotourist[18]

Lodges are generally preferred by the experienced ecotourist, with 66 percent stating cabins as their preferred choice of accommodation, followed by lodges/inns at 60 percent and tent/camping at 58 percent. In contrast, the general consumer prefers to stay in hotels/motels (56 percent), although as lodges become more upscale and comfortable, they will gain increasing popularity with the general consumer as well.

4.5.1.4 Corporate versus Personal Traveller

Corporate travellers use lodges either for meetings with their own management teams and with clients or incentive travel used to reward/motivate employees. This segment looks for amenities such as meeting and conference rooms, fully equipped with telephones and Internet access. Individual rooms may also be required to have data access. As well, they will look for activities that promote interaction between people, particularly if the purpose of the trip is for team-building for managers or with clients. The personal traveller is looking for a unique location and activities to do with friends and/or family. This segment values the overall ambiance of the location as well as opportunity to have both privacy as desired and opportunity to meet and share experiences with other guests in common areas.

These market segments are not necessarily mutually exclusive. Often, corporate travellers will choose to bring their families on a subsequent vacation if they enjoyed the experience and if the lodge caters to both segments.

4.5.2 Key Trends and Issues

Issue/Trend	Implications
Ecotourism continues to grow in popularity.	Lodges will need to support activities that, unlike fishing and hunting, are non-consumptive. They will need to be developed and operated in such a way as to minimize the environmental impact. This includes adopting catch-and-release fishing and following a "green" code of conduct.
Lodges are becoming multi-activity and multi-season resort destinations for both guided and self-guided activities.	By being multi-activity and multi-season, lodges are in a better position to manage their cashflow and staff. It will be important to find complementary activities to leverage staff and

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[18] Greening of Remote Tourism Lodges, Pam Wight & Associates, 1994.

Issue/Trend	Implications
	equipment across seasons.
Some operators that guide tours and own lodges are promoting the lodge as the main attraction as opposed to a particular activity or trip component.	While it is still important to have a high quality guiding operation, the lodge can be a key differentiating factor, particularly to the soft adventure market. This market looks for a high quality, comfortable experience in the outdoors.
Theming is on the rise.[19] 36 percent of leisure travellers surveyed said they were looking for a resort or hotel with a distinctive theme.	Although outdoor adventure could be considered a theme in and of itself, the increasing number of lodges will dilute this as a differentiating factor. Therefore, specialization will become more important for a lodge to succeed.
Lodges are catering more towards upscale tourism with particular attention to food and wine.	Having gourmet food prepared by a professional chef and a good wine selection (perhaps highlighting local wines) is important for lodges targeting the soft adventure and corporate markets.
Building a lodge is capital intensive, and has a slow development process with uncertainty of tenure for the building and activity area.	From an existing lodge operator's perspective, this creates a barrier to entry for new competition. From the perspective of a community trying to increase tourism, it will be more difficult to find people to undertake the risk of developing new lodges.
A lodge may not add value to the local economy if it does not employ locals and make use of local suppliers.	Lodges may face resistance from local communities and government organizations in building and operating unless they contribute to the area.

4.5.3 Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Building	Remote, uncrowded location. Ambiance. Minimal impact on environment. Other amenities, such as sauna or meeting/conference rooms for	Selecting a remote, scenic location that has controlled access. Following strict environmental principles in building and operating the lodge and developing a code of conduct to be

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[19] National Travel Monitor, Yesawich Pepperdine & Brown, 1999.

Product Component	Key Success Factors	Levers For Success
	business guests.	followed by both staff and guests. Designing the building so that guests are allowed privacy and also common areas that encourage interaction amongst guests. Adding amenities that add to the enjoyment of the overall experience.
Supported Activities	High-quality equipment for activities. Information and guides, as required, for route planning and participating in an activity.	Purchasing brand-name equipment that is well-maintained. Partnering with guiding operations to offer tours where expertise does not exist in-house. Hiring knowledgeable, personable staff.
Transportation	Ease of access to and from major centres.	Arranging for transportation to/from the airport for longer trips, and from major centres for all trips.

4.5.4 Case Examples of Best Practices

4.5.4.1 Case #1: Nimmo Bay Heli-Ventures, BC

Nimmo Bay Heli-Ventures is a high-end lodge, helicopter and fishing tour operator that has been described as offering a "supremely indulgent wilderness experience."[20] This multi-activity resort supports rafting, hiking, picnicking, kayaking, wildlife viewing and fishing activities. What has made Nimmo Bay Heli-Ventures successful?

Controlled access to a remote area: Transportation to and from the lodge is via water taxi, float plane or helicopter. A maximum of 16 guests can be accommodated at a time in the private 2-bedroom chalets. For its fishing adventures, helicopters are used to take customers to secluded areas nearby.

A unique activity offering: Nimmo Bay offers activities using its helicopters as transport but also as part of the adventure – something called "sky dancing" helicopter rides which highlight the scenery in the surrounding area as well as adding excitement to the ride through special maneuvers.

A completely high-end experience: Everything has been designed with the soft adventure traveller seeking high quality in mind. This includes the helicopters equipped with stereos, and gourmet meals featuring specialties such as smoked salmon and freshly baked goods every day.

Minimizing impact on the environment: In 1999, Nimmo Bay Heli-Ventures was given an Environmental Award for Industry and Business in BC. The resort was built on floats in order to avoid impacting the land. Other measures (e.g. catch-and-release) for fishing trips have also been implemented.

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[20] "Way, Way Out There at B.C.'s Adventure Lodges", National Geographic Adventure, pp. 97-100, Summer 1999.

4.5.4.2 Case #2: A Lodge for the Business Crowd[21]

A two-hour drive from Dallas (or, for those so inclined, there's a helipad), Rough Creek Lodge Executive Retreat & Resort is tailored to a business clientele with a taste for the game - wild game, that is.

Some guests do choose to hunt at Rough Creek. During bird-hunting season, this $25 million resort, opened early last year on an 11,000-acre Texas ranch, even offers "executive hunt" and "businessman's hunt" packages-with English pointers, guides, and shotguns provided. But for most of those who go, hunting merely provides the lodge's tasteful motif.

Rough Creek is certainly "away". As you rock on your private porch, looking out over a small lake, you don't see much of anything: just wide-open spaces, populated by an occasional stand of trees. But the low-slung, contemporary accommodations-designed by Larry Speck, dean of the University of Texas architecture school-are certainly gracious. The comfortably macho executive suite has leather furniture, darkwood trim, heavy doors, and granite countertops. The rooms were well equipped, with ceiling fans, satellite TV (no cable out here), large desks, and two-line phones.

Massages from the onsite staff get most visitors off to a properly relaxing start. A state-of-the-art conference facility for groups of no more than 100 is meant to position Rough Creek for high-end executive meetings. There's also a tennis court, miles of hiking trails, a fitness center, and a heated outdoor pool. For semi-sedentary sportsmen, there's catch-and-release fishing in the lake, and golf nearby."

4.6 Mountain Biking /Touring

This profile includes mountain (off-road) biking and bicycle touring –activities that have distinct needs in terms of the bicycle equipment and terrain required. Mountain biking includes both cross-country and downhill biking on terrain ranging from logging roads to single-track in mountain areas. According to a 1997 US study[22], mountain biking was one of the top ten fastest-growing outdoor recreation activities. Helicopters now offer access to even higher and more remote alpine areas for mountain biking. Cycle touring ranges from casual day trips to randonneur (long distance, multi-day tours) cycling on highways and back roads. Information in this profile that pertains to a particular type of cycling will be noted as such.

4.6.1 Customer Profile/Market Segmentation

4.6.1.1 Overall Demographics

Bicycling (touring and off-road) traveller in Canada have the following characteristics:

- Travel with friends (31.5%) or in couples (26.9%).

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[21] "Fall's hot spots: Rough Creek Lodge", Fortune, September 27, 1999.

[22] Human Powered Outdoor Recreation, State of the Industry Report, Outdoor Recreation Council of America, 1997.

- From Canada(83.1%)
- Younger, with 67.8% between 20 and 44 years of age.
- Nearly evenly split between male and female.

[23]

[24]Geographic Region	Percent of total participants (1993)	Geographic Region	Percent of total participants (1993)
BC	17.4	US	15.0
Ontario	51.1	UK	0.6
Rest of Canada	14.6	France	3.4
Canada (total)	83.1	Germany	9.2
		Japan	1.1

The Adventure Cycling Association, an organization that sponsors many tours annually has found that for its 2 to 3-month cycling expeditions, participants are from a wide range of ages, mostly male (65%) and solo travellers.[25]

4.6.1.2 Challenge versus Experience Seeker

The challenge seeker prefers cycling that is physically and/or technically demanding. For mountain biking, this may involve rides with extended uphill routes and technical single track with obstacles such as roots and rocks. For cycle touring, this involves steep climbs and long distances. The challenge seeker is likely to own or rent a high-end bicycle.

The experience seeker looks for cycling on wider, easier roads with relatively flat terrain. Of more importance is the ability to learn and explore the surrounding area, particularly the natural and cultural features. Distances travelled are likely to be shorter with longer stops for sightseeing.

4.6.1.3 Credit-card versus Self-contained Tourist[26]

The credit-card tourist is more willing to pay for convenience and upscale accommodation, food and guided service. Rather than having to plan extensively beforehand, these tourists rely **heavily on a** tour operator to plan the itinerary or they simply make decisions en route. The expectation (or hope) is that all stops and destinations will have the amenities for which the tourist is looking. The self-contained tourist prefers to be self-supporting, and relies much less on expenditures after the trip has started. For cycle touring, they will carry most of what they need using panniers, but for larger, more extended trips, they may use a support vehicle.

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[23] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-31, The Randolph Group, January 1997.

[24] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-31, The Randolph Group, January 1997.

[25] Adventure Cycling Association website, www.adv-cycling.org/tours/expeditions.html.

[26] REI Website, www.rei.com.

4.6.2 Key Trends and Issues

Issue/Trend	Implications
For mountain biking, there can be conflicts over trail use with hikers and horseback riders. In some areas (e.g. North Shore Mountains in the Lower Mainland), trails are being closed off to mountain bikers.	Trails can be either developed separately for each activity or for shared use. The development of shared-use trails in co-operation with other user groups is more cost-effective in using a limited, common land resource.
Parks are being created specifically for mountain biking, where trails are all well-marked and graded for difficulty.	This may lead to an increased in trails designated to specific activities as a way of reducing conflict between various user groups. This is a viable solution where separate trail systems can meet demand for each user group. In cases where the land resource is limited, however, this solution may not be adequate.
Ski resorts are offering mountain biking in the summer, often allowing bikers to use the chair lift systems to transport themselves and their bikes up the mountain. These resorts, which promote themselves as multi-activity destinations, are becoming increasingly popular biking areas.	Communities and tour operators who do not have a ski resort will have more difficulty in competing against the resorts for larger tourist segments, particularly since they may not have the same level of tourism infrastructure. These areas will need to develop supporting infrastructure and/or find a unique way of differentiating themselves from the ski resorts in order to compete.
Cycle touring has increased mainly in rural or natural settings. The slower-paced touring preferred by experience seekers allows for more interaction with the environment.	To support this type of touring, there is a need to develop infrastructure in rural communities looking to be a part of a touring network in order to stimulate interest and demand.
Full suspension bikes are becoming more popular for mountain biking.	This allows more bikers to access challenging terrain. This will increase the need for communities and operators to develop trail plans to ensure their usage is managed properly.
Recumbent bicycles, which allow for more relaxed and efficient cycling, are becoming more popular with baby boomers.	This may increase the popularity of cycle touring, as more people are able to participate in a less strenuous activity.
Equipment, eyewear and clothing are becoming	Operators will need to either specialize in a

Issue/Trend	Implications
specialized for mountain biking and cycle touring.	particular type of cycling activity and market segment, or carry a wide selection of equipment if they rent. As well, retail sales of equipment and clothing may present an additional opportunity for these operators.
Extreme mountain biking activities are being introduced and gaining popularity within a younger, but small, market segment. Activities include downhill mountain biking in both summer and winter.	Destinations can develop a reputation as a mountain biking area by catering to more extreme, hard adventure participants through special events, before moving into softer adventure activities.

4.6.3 Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Trails or Roads	Well-marked and mapped trails with varying degrees of difficulty. Well-maintained trails/roads. For cycle touring, overall road safety and congestion.	Developing trails in areas with natural and cultural features. Selecting routes that are more secluded, yet have interesting destinations, such as back roads. Ensuring trails/roads are kept in shape, in co-operation with other user groups.
Natural environment	Good climate. Interesting scenery and features.	Using routes that provide good access or viewpoints to features. Running tours during the time of day and year when climate is most agreeable.
Stops and Destinations	Interpretive facilities. Interaction with local people. Amenities.	Allowing for time to learn and interact with the areas visited. Having guides with good knowledge of the area to share with guests. Developing a touring network with basic infrastructure for cyclists. Having local events such as festivals to attract tourists.
Bicycle rentals	Quality, well-maintained brand name equipment. Spare equipment for breakdowns. Key accessories such as panniers,	Hiring knowledgeable staff in the rental shop. Purchasing and developing good relationships from quality equipment

Product Component	Key Success Factors	Levers For Success
	water bottles and repair kits.	vendors.
Guiding	All-inclusive, worry-free itinerary. Challenge and interest appropriate for each participant. Support vehicles to allow for longer cycling distances.	Offering free tours of the area, where revenue is generated from other sources such as food and accommodation. Hiring guides knowledgeable in bike repairs, first aid and the local area. Learning as much about the participants before and early on in the trip to assess their interests and ability levels.
Instruction	Clear, easy-to-follow instruction. Promotion of safe and responsible riding.	Offering free clinics for technical riding. Providing practice time for technical maneuvers before going on a trip.
Food and Accommodation	Quality food and accommodation throughout the trip.	Ensuring that trip is planned for meals and accommodation that is in line with the expectations of the participant. Marketing to the appropriate target market given the level of food and accommodation.

4.6.4 Typical Operator Characteristics

Canadian tour operators offering bicycling as the major activity had the following characteristics in 1993:[27]

Average length of trips in days	5.6
Average number of employees	5.3
Gross revenue per operator	$151,541
Average gross margin	30.1 %

4.6.5 Case Examples of Best Practices

4.6.5.1 Case #1: Moab, Utah

Moab is known as the mecca for mountain biking. Until the 1980s, it was mainly a farming and mining community. Since that time, tourism and recreation have become the most significant contributors to the local economy, with over 1 million visitors each year.[28] What makes Moab such an attractive destination?

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[27] Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p.31, 1995.

Accessibility: While Moab is far removed from major cities, it is easily reachable by highway. As well, there are multiple round-trip services between Moab and Salt Lake International Airport.

Trails: Moab has a multitude of sandstone trails nearby for mountain bikers of all ability levels. The most famous and popular trail is the Slick Rock Trail that was originally developed 30 years ago for motorcycles. It is clearly marked with a dashed white line from beginning to end. There are less crowded trails throughout nearby Canyonlands and Arches National Parks. Most trails are multi-use, being shared with motorized vehicles, hikers and horses and administered by the Bureau of Land Management. A program is in place to emphasize the importance of mountain bikers and other users of staying on the roads and trails in order to protect the fragile environment.

Tourism Infrastructure: To support the influx of biking enthusiasts, there are many inexpensive campsites, motels and hotels in Moab, as well as restaurants and bike shops. An area on the outskirts of Moab called Sand Flats has been established to accommodate campers during the busy spring break period and charges a user fee so that it is self-sustaining. In 1999, the Moab Skyway Scenic Chair Lift was opened, giving bikers a ride up to the top of Moab Rim from where they could ride downhill.

Events and Festivals: Throughout the year, Moab plays host to several events. The Canyonlands Fat Tire Festival is held every October where mountain bikers from around the world get together for biking and festivities.

Other Activities: Moab also has many other outdoor activities available such as whitewater rafting, hiking, climbing, 4x4 and horseback riding.

4.6.5.2 Case #2: Tours with CycleItalia

CycleItalia is a bicycle touring company that targets the serious recreational cyclist looking for challenging rides combined with good eating and an excellent cultural experience in Italy. The trips are generally longer (up to 3 weeks) and in smaller groups. Participants must bring their own bicycles.

The company provides pre-trip information, such as instructions on packing a bicycle for airlines. Transportation is provided from the airport in Rome or Milan to the starting point of the tour. Before the tour begins, each bike is put together, inspected and tuned up by CycleItalia. The trips have been designed by the husband and wife team, who have spent over 10 years cycling and guiding tours throughout Italy. The routes taken are through untouristed regions as well as more popular places such as Florence.

As a part of its challenging rides through the Alps and other scenic areas in Italy for experienced cyclists and mountain bikers, CycleItalia provides support vehicles to transport luggage and provide a lift for cyclists as required or desired along the way. CycleItalia adds to the overall cycling experience by carefully selecting unique hotels or small, family-run inns for accommodation. This is made easier by the fact that tours are run in smaller groups. Routes and destinations emphasize opportunities to participate and sightsee in towns and cities along the way. Another key component of every trip is the authentic local food and wine experienced along the way.

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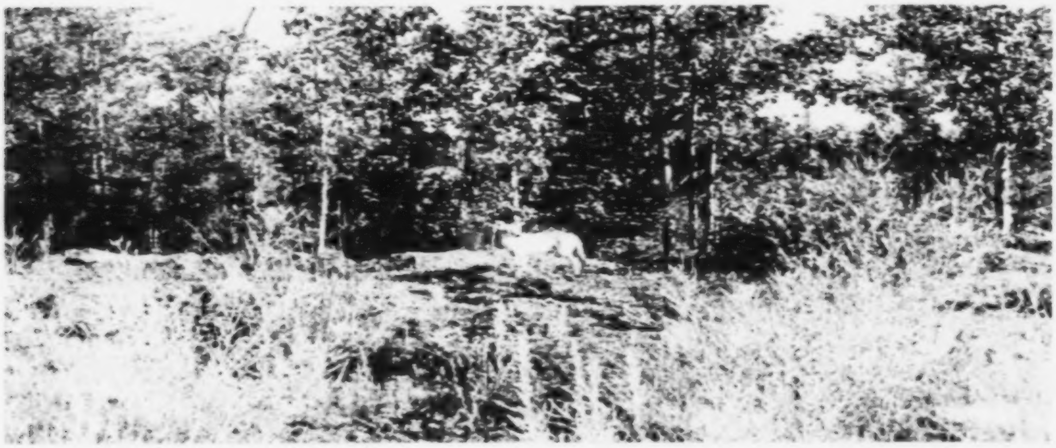
[28] Moab Area Economic Development website, www.moab-utah.com/economic/development.html.



Coyote along Tachie Highway Photo from David Nicolson

4.7 Wildlife Viewing

Wildlife viewing is an activity that involves observing and learning about animals in their natural habitat. It includes activities such as whale watching, bear viewing and birdwatching (although birdwatching is often placed into a separate category for statistical purposes - birdwatching is one of the most popular and fastest growing recreational activities in North America[29]). Wildlife viewing is often added as a theme to other activities such as hiking or kayaking and trips can range from a half-day to 7 days.

4.7.1 Customer Profile/Market Segmentatio

4.7.1.1 Overall Demographics

According to a 1995 study in Canada[30], wildlife viewing (including birdwatching) travellers in Canada have the following characteristics:

- Baby boomers with more than half between 35 and 54
- Even split between male and female
- Mainly travelling in couples or families
- Over three-quarters are from Canada or US.

The number of whale watchers worldwide increased by 10 percent per year between 1991 and 1994.[31] Birdwatching is fastest growing sub-segment and its participants are generally older, more educated and affluent than those in other wildlife viewing activities.[32] BC residents are active participants with 32 percent involved in wildlife viewing and 20 percent in birding.[33] There are opportunities to target both BC residents and out-of-province visitors in this growing market. The participants in this activity also fit the profile generally associated with the soft adventure traveller.

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[29] "Not just for the birds", Dawn Hanna, Vancouver Sun, F7, March 19, 1998.

[30] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-31, The Randolph Group, January 1997.

[31] Whale and Dolphin Conservation Society Report, 1995.

4.7.1.2 Primary versus Secondary Activity

Wildlife viewing is generally not the prime reason for a tourist to select a travel destination. For one-third of operators offering wildlife viewing tours, wildlife viewing was a secondary product.[34] However, there are tourists who choose a destination primarily because of its wildlife viewing. For example, avid nature enthusiasts go to the Johnstone and Queen Charlotte Straits for its prime whale watching (orcas). The casual wildlife viewer is more likely to participate in wildlife viewing as one of several activities offered by a travel destination.

4.7.1.3 Land-based versus Boat-based Observers

For activities such as whale watching and bear viewing, participants can either stay on land or travel by boat to view the animals. Land-based observers may be slightly more risk-averse, as boat tours can involve risk depending on weather and water conditions. Boat-based observers are keen on the achieving a closer encounter with wildlife and experiencing the environment in which the animals live that may not be accessible by land.

4.7.2 Key Trends and Issues

Issue/Trend	Implications
Ecological reserves, which promote scientific study and conservation of wildlife, are becoming more popular.	This will limit commercial development and public access to wilderness areas. Where wildlife viewing is permitted, operators will need to demonstrate their commitment and ability in conserving and minimizing their impact on wildlife.
The number of resident killer whales in BC is shrinking.[35]	More stringent government regulation of whale watching tours is expected within 18 months from the Department of Fisheries and Oceans. In the meantime, self-regulation amongst commercial operators will be encouraged with measures such as restricting the number of trips.

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[32] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-28, The Randolph Group, January 1997.

[33] Major Parks Plan Study – Final Report and Conclusions, p.28, November 1995.

[34] Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p.14, 1995.

[35] "Has Whale Watching industry peaked?", Business Examiner, October 5-18, 1999.

Issue/Trend	Implications
There are approximately 85 commercial whale watching tour boat operators on Vancouver Island with 5 or 6 getting 80 percent of business.[36]	Consolidation of whale watching tours is likely to avoid overcrowding and as more operators become less profitable. Even with low barriers to entry for those owning boats already, the degree of competition could result in more operators exiting than entering the industry in BC.
Conflicts with hunting	For bear viewing in particular, the reported cases of hunting interests clashing with viewing activities are increasing. Such events can be very damaging to the visitor experience and jeopardize market and product development.
Habituation	Wildlife managers are concerned about the habituation of wildlife to the presence of humans. Not only does this diminish the viewing experience, it can present safety problems, for example in the case of bears.

4.7.3 Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Wildlife Viewing	Wildlife sighted within a reasonable timeframe (30 minutes). Good access to viewing sites. Uncrowded conditions. Pristine, scenic environment.	Developing good knowledge of wildlife behaviour to determine best viewing times (time of day and year). Establishing limits to prevent overcrowding and regulations to avoid unduly disturbing the wildlife. Coordinating efforts across all tour operators to avoid overcrowding and to maximize viewing opportunities.
Interpretation	Knowledge and ability to entertain while educating about the wildlife. Consideration and conservation of wildlife.	Hiring guides who are knowledgeable and genuinely concerned for the wildlife and also have strong communication/ presentation skills.
Facilities	Sales office with good signage to promote a professional, reputable image.	Finding a good location within the community which is easily accessible and visible. Working with partners in the

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[36] Ibid.

Product Component	Key Success Factors	Levers For Success
	Interpretive displays and information.	community such as researchers to develop interpretive displays.
Transportation	Convenient transportation to and from viewing points. Safe, certified vehicles. For boats, good on-board facilities to create a more comfortable and enhanced experience (e.g. use of hydrophones to add an auditory component to the whale watching experience). High utilization of vehicles/boats.	Developing good feeder service from high tourist areas to the viewing areas. Meeting or exceeding any safety and environmental regulations. If none exist, developing a code which is published and followed. Developing unique ways to add to the educational component of the wildlife viewing experience. Scheduling tours to maximize the use of assets.

4.7.4 Typical Operator Characteristics

According to a 1993 survey of various wildlife viewing tour operators in Canada,[37] it was found that:

	Birds	Whales	Polar Bears	Other Wildlife
Average length of trips in days	6.5	2.9	5.4	7.0
Average number of employees	3.2	3.8	3.2	3.3
Gross revenue per operator	$106,214	$171,790	$186,761	$419,009
Average gross margin	18.1 %	18.5 %	7.4 %	18.1 %

4.7.5 Case Examples of Best Practices

4.7.5.1 Case #1: Whale Watching at Kaikoura, New Zealand[38]

Kaikoura has developed a reputation for being one of the best destinations in the world for seeing whales and other marine mammals. It is the only destination that strictly manages the whale watching tour industry. The Marine Mammals Protection Act manages the level and type of activity allowed in the area. Currently, a maximum capacity of 45,000 people per year has been set. A permit can be obtained by submitting an operation plan that includes outlining the educational component the proposed tours. While only a single operator has a permit for whale watching in Kaikoura, capacity has increased by using larger, less intrusive vessels.

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[37] Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p.19, 1995.

[38] www.whalewatch.co.nz

Building a Community

Whale Watch Kaikoura Limited, a community trust owned and operated by New Zealand's indigenous people, the Maori, is the sole whale watching tour operator in the area and has won environmental and eco-tourism awards. Kaikoura was previously an area of high unemployment. Whale watching has brought prosperity to the town, with a wharf and harbour facility being built to support this burgeoning industry. Tourism grew from 3,400 visitors in 1987 to over 200,000 a mere 10 years later. Whale Watch has not only contributed to the economic development of the community, but also to the education of its staff and the local people. The Kaikoura Centre for Continuing Education was established to provide marine tourism business training for all of its staff, many of whom were previously unemployed.

Planning for the Future

Whale Watch is not sitting still. It has implemented modern technology to enhance the viewing experience using monitors to show a whale's underwater activities. It is also working with the Department of Conservation to study the impact of whale watching on the mammals by providing data collection logs recorded by its skippers. Whale Watch is also being proactive in developing infrastructure to support the increasing popularity of the area, including the development of a hotel, marine complex and tourist centre.

4.7.5.2 Case #2: Brown Bears in Katmai National Park, Alaska

Katmai National Park has the highest concentration of brown bears in the world (with more than 2,000) and is renowned for its bear viewing opportunities. The area also boasts incredible scenery, including the Valley of 10,000 Smokes, a volcanic area. In 1998, a study was performed to determine the effect of human use in the area, the results of which would be used to adjust commercial permit specifications in order to reduce the impact on the bears. This study was funded largely through a grant from the private sector (Canon U.S.A.) via the National Park Foundation.

Katmai Coastal Tours for Bear Viewing

Katmai Coastal Tours (KCT), based in Homer, Alaska, runs bear viewing trips in a protected bay using a small ship to gain access to prime viewing areas. A seaplane operator provides transportation to the ship, in the capacity of a business partner. The ship crew, who lead the 4 to 6 day tours, consist of a US Coast Guard licensed captain, a bear naturalist/guide and a chef. There are also special trips featuring guest lecturers such as world-famous bear biologist Lynn Rogers. To supplement the bear viewing activity, KCT provides bear education, photography workshops, hiking and 3 gourmet meals a day. KCT has trips targeted to different customers or unique market segments such as seniors, hiking enthusiasts, photographers/filmmakers and families with children. KCT provides support to the North American Bear Centre, both in terms of funds and sightings data.

Fort St. James Photo from www.princegeorge.com/tourism/forststjames

4.8 River Kayaking

River kayaking is a much more specialized, niche activity compared to sea kayaking. It is not targeted to the larger soft adventure market. Therefore, most operators also run whitewater rafting tours to ensure an adequate volume of business.

4.8.1 Customer Profile/Market Segmentation

4.8.1.1 Overall Demographics

River kayaking adventure travellers in Canada have the following characteristics:[39]

- Younger (between 20 and 44 years old)
- Male (59.9%)
- Travel with friends (29.4%) or in couples (28.0%)
- Almost all from Canada or US (93.5%) with over 80% from within Canada.

Geographic Region	Percent of total participants (1993)
BC	10.7
Ontario	45.1
Rest of Canada	25.7
Canada (total)	81.5
US	12.0
UK	1.2
France	0.8
Germany	0.1
Japan	0.8

This demographic profile of the North American (Canada/US) younger adult is more consistent with the enthusiast profile below.

4.8.1.2 Participant versus Enthusiast

An enthusiast has been defined as a person who kayaks 9 times or more in a year, whereas a participant is anyone else who kayaks at least once a year.[40] Whitewater kayakers are generally enthusiasts dedicated to the sport that use their own kayaks. The key criteria used by enthusiasts are the same as those described for activity-based decision-makers.

A "participant" is more likely to value other activities such as culture and scenery, similar to the destination-based decision-maker. This category also includes special groups such as schools and women's groups, who are looking for a "once-in-a-lifetime" experience. The participant segment is looking for a trip which includes river kayaking as only a part of a larger, overall experience.

4.8.1.3 River Running versus Whitewater Rodeo

River running, or kayaking downstream with the river's current, includes both shorter and longer trips that include overnight camping. The number of people in this segment appears to have stayed relatively flat over the last few years.

Growing in popularity is the sport of whitewater rodeo or playboating, which involves staying in one area of the river and performing a series of technical maneuvers. The participants in this segment tend to take much shorter trips, usually of 1 or 2 days duration.

4.8.1.4 Destination versus Activity

Since river kayaking is a riskier, hard adventure activity than most other outdoor activities and requires more skill, most river kayakers will have selected their travel destination based on their decision to participate in the activity – in other words, the ***activity-based decision-maker*** segment is more significant. It is unlikely that travellers will make a spontaneous decision to participate in whitewater kayaking after arriving at a destination.

The key criteria used by the activity-based decision-maker include the level of whitewater vis-à-vis the kayaker's skill level (Class IV and V for experts), and access to the river for put-ins and take-outs. The better- developed river destinations allow users to drive near the rivers and launch points. Finally, emergency provisions and promotion of safety also play a factor in the decision of where to kayak.

Additional criteria used by destination-based decision-makers who engage in river kayaking include the scenic beauty and unique cultural aspects of the destination area.

4.8.2 Key Trends and Issues

Issue/Trend	Implications
People are generally looking for shorter trips, on average for 7 days when travelling abroad.	Yield management for tour operators will be increasingly important as a result of running more numerous, short-term trips.
Many customers are looking to organize trips	Tour operators will need to tailor their trips to each

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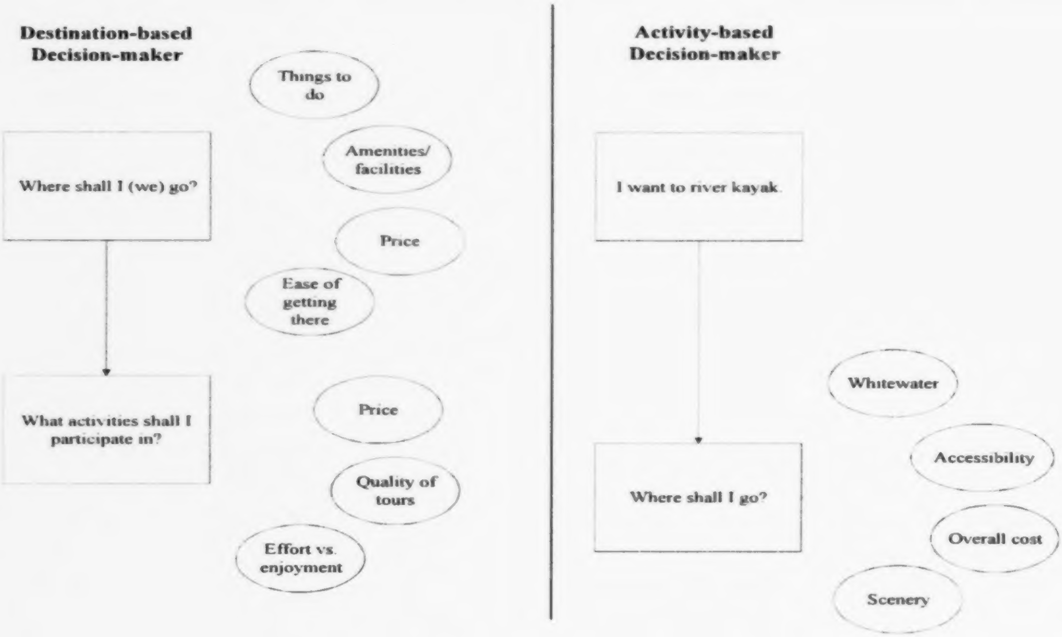
[39] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-31, The Randolph Group, January 1997.

[40] "Outdoor Recreation Participation Study for the United States", Outdoor Recreation Coalition of America, December 1997.

Issue/Trend	Implications
for their own groups, rather than signing on as individuals or couples to a larger group.	of these groups, and may be able to charge more for such customization. This may also provide greater opportunity to generate repeat business with satisfied customers.
There is a trend towards taking trips that combine kayaking with other activities, such as hiking and sightseeing.	Tour operators will need to offer a greater variety of trips that include different destinations and activities.


Destination-based Decision-maker
Where shall I (we) go?
Things to do
Amenities/ facilities
Price
Ease of getting there
What activities shall I participate in?
Price
Quality of tours
Effort vs. enjoyment
Activity-based Decision-maker
I want to river kayak.
Where shall I go?
Whitewater
Accessibility
Overall cost
Scenery

4.8.3 Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Kayak rentals	Modern, well-maintained equipment.	Consider leasing equipment in order to be able to continually upgrade to newer equipment, which is more important with river kayaking than with sea kayaking.
Kayak instruction	Different levels of instruction depending on ability. Instructors' ability to clearly explain, demonstrate and provide feedback and	Hiring instructors/guides who have proven certification and demonstrate ability to teach. Ensuring that instructors are kept up-to-date on new teaching and training

Product Component	Key Success Factors	Levers For Success
	coaching.	methods.
River and its surroundings	Good whitewater. Accessibility to river. Scenic and unique cultural surroundings.	• If waterflow is controlled by dams, developing coordinated plan to match water conditions with planned usage. • Developing put-in and take-out sites that are easily accessible.
Guiding	Good knowledge of the river and geography. Challenging water to navigate for enthusiasts. First aid and safety knowledge and ability. This component is a key differentiator since this activity demands more skill and attention.	• Investing time and effort in developing the itineraries and routes for trips. • Having pre-prepared options in the event of poor weather. • Hiring guides who know the area well and are certified. • Ensuring co-ordinated support is in place for take-outs.
Interpretation	Attractiveness of scenery Area with interesting natural and/or cultural environment and history. Interpreter/guides' knowledge of the area and ability to convey this knowledge in an interesting and informative way. This component is more important for the destination-based decision-maker.	Hiring trained interpreters/guides who are local and experts in the area and who interact well with people. Continually updating the knowledge of interpreters and if appropriate, contributing to local conservation and research efforts.
Food and accommodation	Be clear on what can be expected for food and accommodation on trips and exceed those expectations.	Carefully planning food and accommodation to be provided and providing this information to customers in advance. This must be consistent with the type of customer being targeted.

4.8.4 Typical Operator Characteristics

Canadian tour operators offering river kayaking as the major activity had the following characteristics in 1993.

[41]Average length of trips in days	3.6

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[41] Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p.26, 1995.

Average number of employees	5.9
Gross revenue per operator	$149,389
Average gross margin	25.2 %

4.8.5 Case Examples of Best Practices

4.8.5.1 Case #1: Competing Beyond Whitewater

While whitewater continues to be perhaps the most important criteria in deciding on a river kayaking destination, other factors will become increasingly important as operators target larger customer segments such as the adventure traveller.

Providing Greater Tourism Infrastructure

Areas such as Nepal, Chile and Ecuador have world-class whitewater with outstanding scenery. However, accessibility to put-ins / take-outs and logistics in these countries are undeveloped, making it more difficult for both tour operators and independent travellers to establish their itineraries. The Futaleufu River in Chile is hard to get to, particularly with kayaks since access is by small plane. In Ecuador, taxi drivers can provide transportation support between put-in to take-out points.

Costa Rica, which boasts great whitewater on rivers such as the Pacuare, has been on the forefront of ecotourism development and has an infrastructure that has allowed for and attracted strong tourist demand. Transportation is readily available and travellers can make reservations for accommodation and trips well before arriving at Costa Rica. As well, information on kayaking the rivers is readily available.

Adding to the Experience

The Nantahala Outdoor Center (NOC) is an outdoor recreation provider based in North Carolina established in 1972. It offers whitewater kayak trips around the world. In order to service the adventure travel market, it has looked for ways to offer a unique product beyond great whitewater kayaking. This includes offering advanced kayak trips to Bhutan, where the cultural component of the destination is a key differentiator.

NOC has also begun incorporating other activities with its river kayaking trips. On its week-long trips to Honduras, it includes 5 days of whitewater kayaking guiding and instruction along with 2 days at the beach where customers can snorkel, scuba dive and swim with dolphins.

4.8.5.2 Case #2: Water Management on the Ocoee River[42]

The Ocoee River is one of the most popular river kayaking destinations in the US and served by 24 outfitters (mainly rafting companies). It is near many towns and was host to the 1996 Olympic whitewater events. On an annual basis, it can see up to 300,000 people on its waters. Ocoee's Hell Hole is famous amongst kayakers who enjoy whitewater rodeo.

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[42] "Take Me to the River, Squeeze Me on the Water: A Look at 14 of America's Most Popular Day Trips", Paddler, pp.68-73, November/December 1999.

Three agencies co-developed the Ocoee River Management Plan. Together, they manage the use and waterflow of the Ocoee River, which was once a dry river. The Tennessee Valley Authority is responsible for water management (dams), the National Forest Service, who owns the land, handles the permitting process, and the Tennessee Department of Environment and Conservation provides day-to-day management at the put-in and take-out points. Park rangers provide assistance to users and maintain traffic flow on busy days. River use has been capped at 4,000 people per day and is currently enforced only on long weekends by the National Forest Service.

4.9 Snowmobiling

Snowmobiling has become an increasingly popular recreational activity in Canada and the northern states. Participation in the US increased by 34 percent from 1982 to 1994.[43] Successful snowmobile areas require not only good snow conditions and outstanding scenery, but well-developed and maintained trails as well.

4.9.1 Customer Profile/Market Segmentation

4.9.1.1 Overall Demographics

Snowmobiling adventure travellers in Canada have the following characteristics:[44]

- Fairly evenly distributed amongst age groups, with a significant portion 35 and over (60.1%).
- More likely male (73.1%).
- Travel with friends (43.7%).
- From other countries (60.7%).[45]

Geographic Region	Percent of total participants (1993)
BC	3.9
Ontario	9.6
Rest of Canada	17.8
Canada (total)	31.3
US	8.0
UK	0.5

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[43] Outdoor Recreation in the United States: Results from the National Survey on Recreation and the Environment, Chapter 2.

[44] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-31, The Randolph Group, January 1997.

[45] Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p.48, 1995.

France	44.8[46]
Germany	6.6
Japan	0.2

While the median age of participants is 41, many younger people are being introduced into the activity through family outings. 94.5 percent of participants consider snowmobiling a family sport with an average of 3 people within a family participating.[47] While the activity has traditionally been male-dominated, there are an increasing number of women, couples, retirees and families participating. This shift in demographics is associated with the general increase in the soft adventure market. In Whistler, snowmobile tour customers are typically 30 to 40 years old and 40 percent of them are Japanese, with the next biggest group being American.[48]

Snowmobilers also tend to be more affluent. In the US, 70 percent of snowmobilers have annual household incomes of $50,000 or more.[49]

4.9.1.2 E nthusiast versus Participant

Snowmobiling enthusiasts are those who engage in the activity several times a year. 24 percent of snowmobilers take overnight trips. Snowmobilers who take an average 3 to 5 trips a year include 2 nights per trip at the destination area.[50] Enthusiasts are more likely to live near areas that have good snowmobiling terrain, own snowmobiles and be part of a local snowmobiling club or association. They look for challenging terrain that includes "powder play areas" – large, open areas with high snowfall – as well as a well-maintained, integrated network of trails for touring to interesting and unique destinations.

Participants often take on snowmobiling as a day activity as a part of longer trip involving other activities such as downhill skiing. They will not have their own snowmobiles and will require gear as well as basic operating and safety instruction. Participants will value the scenery and wildlife viewing opportunities in addition to the thrill of operating the snowmobile. Participants will go on guided tours whereas enthusiasts are more likely to plan a trip on their own.

4.9.1.3 Hard versus Soft Adventure

Snowmobilers seeking hard or extreme adventure will look for challenging and varied terrain with features such as untracked powder and jumps. If they are renting equipment, they will look for high-performance snowmobiles. Soft adventure travellers are similar to the profile of participants above. While they enjoy the activity of snowmobiling, snowmobiles are quite often seen as a means of getting access to wilderness and other town destinations while enjoying the outdoors.

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[46] These figures are skewed towards snowmobile tour operators in Quebec and are therefore not representative of BC visitors.

[47] "People who snowmobile", International Snowmobile Manufacturer's Association website, 1997.

[48] The Sea to Sky CBR Opportunities Study, p.42, SVI. Environments, Consultant.

[49] University of Montana study, International Snowmobile Manufacturer's Association website.

[50] Economic Impact survey, Snowmobiling American Council of Snowmobile Associations website.

4.9.2 Key Trends and Issues

Issue/Trend	Implications
With the improved performance of snowmobiles, snowmobile tours are moving into high alpine and glacier travel.	There will be increasing conflict with the heli-ski and ski touring industry, as well as environmentalists. Snowmobiles tour operators will need to work with these groups to determine how to use and maintain the naturalness of these wilderness areas.
There is increased potential for conflict with heli-skiers for use of backcountry alpine areas.	Land/resource managers can provide some assistance for resolving conflicts, but existing legislation and policy directives have been unable to prevent more and more disputes from flaring up. Basically, there are no mechanisms for ensuring CR tenure holders (i.e. heli-ski operators) and unguided snowmobilers to keep out of each others' way. Solutions are most likely to be worked out amongst the user groups themselves.
There is increasing concern of the effect of snowmobiles on the environment, particularly in terms of noise. Environmentalists are generally opposed to the commercialization of snowmobiling in sensitive or wilderness areas.	Operators can be proactive in developing and following an environmental code of conduct that includes requirements to use quieter pipes on sleds (snowmobiles). Operators should work together, using associations such as the BC Snowmobile Federation to lobby governments, in order to ensure that scientific data is gathered to prove the impact of snowmobilers.
The potential for conflicts with road-based motor vehicles, non-motorized forms of winter outdoor recreation and private landowners still exist.	The development and promotion of designated snowmobile trails can avoid such conflicts. It is important for a community to work with provincial and snowmobile associations in the development of these trails. Operators will also want to carefully plan their tour routes to avoid conflict with other parties.
Safety in snowmobiling has always been a high profile issue. Only 5 to 15 percent of snowmobile incidents occur on well-	The use of designated trails should be promoted, with only certified guides permitted to provide tours elsewhere. Communities and resident

Issue/Trend	Implications
maintained, designated trails where 80 to 90 percent of snowmobiling takes place.[51]	operators should be actively involved in the promotion of safety and participate in events such as Snowmobile Safety Week, which will increase both awareness and goodwill.

4.9.3 Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Trails	Good snow conditions that provide enough snow throughout the winter season. For beginners - open, flat ground. For experts - steeper slopes and variable terrain. Integrated trail systems that are well-signed and maintained (groomed) and environmentally-sensitive. Access to higher alpine terrain and scenic destinations.	Developing trails in co-operation with off-season users such as hikers, mountain bikers and horseback riders. Ensuring trails are well-maintained by working with local snowmobile clubs and associations. Working with government and tourism agencies as well as environmental groups to develop and promote the trail systems.
Equipment Rentals	High-quality, well-maintained sleds. High-performance sleds if targeting experts and hard adventure travellers. Good selection of gear (snowmobile suits and helmets).	Hiring qualified mechanics to maintain the sleds. Developing strong relationships with and purchasing quality equipment from well-known vendors.
Guiding and Instruction	Clear, basic instruction for beginners. Emphasis on safety. Access to uncrowded areas with excellent snow conditions and scenery.	Hiring personable, knowledgeable staff. Developing a code of conduct for safety and environmental concerns that is strictly adhered to. Designing tours that take advantage of features in the area.
Infrastructure	Availability of fuelling facilities. Availability of accommodation from hotels/motels to warming cabins.	Developing trail systems with well-positioned infrastructure for touring travellers.

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[51] "Snowmobiling Safety", Snowmobiling American Council of Snowmobile Associations website.

4.9.4 Typical Operator Characteristics

Canadian tour operators offering hiking as the major activity had the following characteristics in 1993:[52]

Average length of trips in days	4.1
Average number of employees	6.7
Gross revenue per operator	$395,120
Average gross margin	17.1 %

4.9.5 Case Examples of Best Practices

4.9.5.1 Case #1: Ontario, Canada[53]

Snowmobiling is one of the most highly organized, highly regulated, and best funded outdoor recreational pursuits in Ontario. The province has been an excellent example in the development of designated snowmobile trails, and shown how communities near these trails can benefit from increased social and economic activity.

The Ontario Federation of Snowmobile Clubs (OFSC) is one of the fastest growing winter recreation organizations in Canada. It was responsible for building and upgrading snowmobile trails in Ontario through the Snowmobile Trail Rehabilitation and Construction program, which was funded by the OFSC and provincial government. The grooming and maintenance of these trails is now funded by user fees in the form of trail permits and other fundraising activities; no government funding is used for these operations. In addition to trail maintenance, a pilot project in Sudbury, Ontario employed volunteers to patrol the snowmobile trails to ensure safety on the trails. With a coordinated effort of the OFSC, the provincial government and local communities, Ontario has now become a popular snowmobiling destination.

4.9.5.2 Case #2: Senior World Tours

Senior World Tours is an operator that offers snowmobile tours for active seniors. It runs trips in West Yellowstone based from Jackson, Wyoming. These trips are all-inclusive: accommodation, transportation, meals, snowmobile rental, gear, fuel and oil for the snowmobiles and guide service are provided.

Participants are carefully outfitted with a suit, boots, helmet, mittens and sled. Trips begin with lessons for beginners on how to start, stop and ride safely on a snowmobile. Participants are then guided open trails with plenty of mountain scenery and wildlife. These trips also feature hot tubs for the end of the day and gourmet meals.

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[52] Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p.36, 1995.

[53] "Snowmobile Trails: Access to the Back Country in Cold Climate", Trails in the Third Millennium, December 1997.

In addition to trips for seniors, the company also runs tours for ladies only, run by a woman instructor/guide. More importantly, Senior World Tours runs Alumni Special Tours for previous customers only, which helps generate repeat business and build customer loyalty.

There is one concern for the future of this operator, however. The US Environmental Protection Agency (EPA) is completing an environmental assessment for Yellowstone National Park, which may result in new regulations for tours in the future. Amidst this uncertainty, Senior World Tours is staying involved in the process where it can, and keeping all of its customers aware of its status.

4.10 Nordic Skiing

Nordic skiing includes any skiing activity that is "free-heeled" – where the ski bindings are not attached at the heel as opposed to alpine ski bindings. In the US, participation has increased by nearly 25 percent from 1982 to 1994.[54] Nordic skiing has been broken down into the following categories:[55]

Surface	Classic	Skating	Telemark	Ski touring
Tracks	▨			
Groomed	▨	▨	▨	
Backcountry	▨		▨	▨

Other activities are often combined with this activity such as snowmobiling, winter camping and orienteering.

4.10.1 Customer Profile/Market Segmentation

4.10.1.1 Overall Demographics

Cross-country skiing adventure travellers in Canada have the following characteristics:[56]

- Younger, with 52.9% under 34.
- More likely female (54.2%).
- Travel in families (38.2%) or with friends (27.0%).
- Almost all from Canada or US (91.5%).[57]

Geographic Region	Percent of total participants (1993)

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[54] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-21, The Randolph Group, January 1997.

[55] "Nordic Skiing: Kick Up Your Heels", www.rei.com.

[56] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-31, The Randolph Group, January 1997.

[57] Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p.48, 1995.

BC	7.9
Ontario	49.1
Rest of Canada	18.8
Canada (total)	75.8
US	15.7
UK	0.7
France	2.8
Germany	1.1
Japan	0.5

More recent statistics for the US show that nordic skiers are evenly split between male and female. The majority of these skiers also participate in other outdoor sports such as hiking, camping and fishing and 25 percent are also alpine skiers.[58] Although cross-country skiing has seen the number of participants decrease over the last decade, the number of women learning to cross-country ski has been on the rise.[59] As well, participation has been increasing amongst senior citizens as the activity has been promoted as an excellent way to enjoy the outdoors and maintain a good level of fitness.

4.10.1.2 Families with Children versus Couples

While this approach to segmenting the market is far from complete, it focuses on two key customer types within the market that are significant and have distinct needs. Families with children value good instruction for both the children and adults, activity areas specifically for younger participants, good ski rental facilities in terms of equipment quality and size selection and dining facilities catering to families. Couples will value not only the facilities and trails for the ski activity itself, but the overall ambience. Key elements to creating the appropriate ambience include the dining and accommodation, which can be designed to cater specifically to the couples market.

4.10.1.3 Destination versus Activity

Destination-based decision-markers will choose a destination that offers several activities, where Nordic skiing is one possible activity. They are more likely to participate in day tours on groomed trails in a multi-activity resort area and will try two or more different activities during their visit. Many participants within this category are alpine skiers who want to try something different for a day.

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[58] SnowSports Industries America, 1999.

[59] SkiTrax, December/Holiday 1999, p.33, "Clear the Trails, Here Come the Grrrls!", Kate Carter.

Activity-based decision-makers are avid nordic skiers who select the destination based on the best location for them to cross-country ski. They are more likely to participate in backcountry touring over several days.

4.10.1.4 Fitness Buff versus Recreationalist

The fitness buff undertakes cross-country skiing primarily as a means of staying in shape during the winter and enjoys the physical exertion from the activity. Nordic skiing is an excellent aerobic workout that uses the entire body. This market segment is more likely to participate in classic and skate skiing on groomed runs where trails and distances are well-marked. As well, fitness buffs are generally younger and participate in the activity alone or with friends.

The recreationalist enjoys the social aspect of the sport and tends to participate with family and friends. The main purpose of the activity is to enjoy the outdoors during the winter. Fitness, however, may be a secondary reason for participating in cross-country skiing. The recreationalist is more likely to ski in the backcountry.

4.10.1.5 Participant versus Enthusiast

Enthusiasts are those people who participate in the activity several times a year. They will invest in their own equipment and look for performance skis. In most cases, they will rely on their network of friends and guidebooks to go on self-guided trips. They also seek a high level of instruction, to improve their technique and in understanding the environment, such as avalanche safety.

Participants will often require basic instruction and equipment rentals. They are more likely to go on a guided tour, particularly if going into the backcountry.

4.10.2 Key Trends and Issues

Issue/Trend	Implications
Cross-country ski areas are being transformed into multi-use, winter playgrounds or resort areas.[60] This is to appeal to a broader market.	Operators, particularly those who are lodge-based will need to provide other activities, such as snowshoeing or snowmobiling for their customers. Attention should also be paid to the accommodation and support facilities, all of which are important to the destination-based traveller.
Technology is making nordic skiing more accessible. Touring skis are now more shapely, giving beginners increased performance with less effort for telemarking. As well, lift-serviced telemark skiing is	Telemark skiing will become increasingly popular as will the overall market for nordic skiing. This will create demand for good beginner instruction and also increase the importance of the accommodation and overall facilities in attracting

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[60] SkiTrax, p.29, December/Holiday 1999.

Issue/Trend	Implications
increasing.	the broader market.
Backcountry skiing is becoming more popular.	In order for operators to access backcountry that is more remote, they will depend increasingly on snowmobiles and helicopters to provide access. This may lead to issues in getting permits to access these areas as well as increase potential conflict with snowmobilers.
In the US, user fees are becoming more common for backcountry areas.	Operators should look to incorporate these fees into the cost of their trips. In BC, they should work with recreational skiers to approach the government to ensure that if user fees are introduced, the fee revenues are used for maintaining and developing the area in which the fees are being assessed.
Ski resorts across Canada and the US are seeing more women taking cross-country ski lessons. At Cypress Mountain, two-thirds of the people taking cross-country lessons are women.[61]	Operators should consider offering women-only clinics and tours. As well, the emphasis should be on developing facilities that cater to those new to the activity and recreational participants.

4.10.3 Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Infrastructure	Transportation to and from base facility and trails. Adequate parking. Clear signage within the facilities area.	Providing bus service to and from. Providing ample parking space near the facilities area.
Trails or ski area	Grooming for classic and skate skiing trails. Well-marked trails. Uncrowded, scenic area for backcountry touring.	Grooming on a regular basis (daily) in a cost-effective manner. Lighting for night skiing can cater to the local and fitness buff markets. Snowmaking can be used to improve

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[61] Bill Cooper, Cypress Mountain (SkiTrax, December/Holiday 1999).

Product Component	Key Success Factors	Levers For Success
	Challenging terrain for advanced skiers. Excellent snow conditions.	snow conditions. Developing trails in an area with varied terrain. Obtaining permits/tenure and planning trip routes in secluded backcountry areas.
Rentals	High-quality, well-maintained equipment. Ability to answer questions from both beginners and experts on equipment and trails in the area. For waxed skis, appropriate waxing for given snow conditions. Availability of appropriate sizes.	Hiring knowledgeable staff in the rental shop. Purchasing high-quality equipment and maintaining it regularly. Keeping track of and meeting the need for various sizes for equipment for the customer segments being targeted.
Instruction	Patient, knowledgeable and personable instructors. Well-publicized lessons which are easy to register into. Beginner trails nearby rental shop and other facilities.	Hiring certified and friendly people for instructors. Providing courses packaged with rentals, and perhaps guided tours, to encourage beginners and casual participants to try a lesson. Developing trails nearby the facilities where lessons can be conducted.
Guiding	Access to uncrowded areas that are lesser known or unsigned. Varied and challenging terrain. For trail systems, ski patrollers or guides who provide directions and advice.	Hiring certified and friendly people with good knowledge of the local area and safety procedures. Developing trip routes that have interesting features and will be perceived as challenging by the participants.
Food and Accommodation	Exceed expectations of customers.	Identifying target markets and developing menu and accommodations that cater to the specific needs of those markets.

4.10.4 Typical Operator Characteristics

Canadian tour operators offering ski tours as the major activity had the following characteristics in 1993:[62]

Average length of trips in days	4.5
Average number of employees	7.3

Gross revenue per operator	$230,122
Average gross margin	4.2 %

4.10.5 Case Examples of Best Practices

4.10.5.1 Case #1: Mountain Meadows, Vermont[63]

This cross-country ski area, originally started in 1971, was bought by Mike Miller in 1988 and transformed into one of the top areas in North America. Mountain Meadows now has over 10,000 skier visits each year. It is in a scenic, sheltered mountain area by Kent Lake. Here are the key components that have made this area a success:

- Trails: The trail system was extended and improved, including the addition of groomed trails for skate skiers. Trails have been made easy to follow by using colour-coded signs. Daily snowmaking and grooming are used to ensure good trail conditions. The trail ratings are updated daily to reflect current snow conditions.
- Support Facilities: A new ski shop was built, which provides the latest equipment for demos. Mountain Meadows also has a large, old-style lodge with indoor and outdoor eating areas.
- Programs: One of Miller's most important hires was the ski school director – an enthusiastic and well-known skier who has developed new programs, including the introduction of the Sprint Tour. This tour is based on the concept of criterium bike racing and has become a nationwide tour sponsored by Lexus.

4.10.5.2 Case #2: Kootenays, BC[64]

The Kootenays offer a unique backcountry experience, having the only inland temperate rainforests in the world. The area has consistently good snow conditions in the winter months. Backcountry ski tour operators access the area by helicopter for week-long tours that take skiers on loop tours through bowls and glades amongst the mountains. Overall, the area has good access to safe terrain.

Aside from the terrain, it is the availability of backcountry huts which differentiates the Kootenays from other ski touring destinations. Operators such as Valhalla Mountain Touring have huts in the area from which they can base their tours. Valhalla owns and runs the Ruby Hut, which is accessible via snowcat, and offers a comfortable setting (including sauna) for its ski visitors.

4.10.5.3 Case #3: Royal Gorge, California

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[62] Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p.36, 1995.

[63] "New Age Skiing Mt. Meadows Rocks", SkiTrax, pp.30-31, December/Holiday 1999.

[64] "Low-Rent District", SkiTrax, pp.19-21, February/March 1999.

The Royal Gorge Cross-Country Ski Area, three hours east of San Francisco, is North America's largest nordic area. While Royal Gorge has an extensive trail system and excellent snowfall, it has developed other components of its offering to deliver a world-class winter resort experience.

Beyond the Trails: Royal Gorge has two main lodges, one of which has B&B style accommodation right by the trail system. A shuttle bus transports skiers from the far end of the trails back to the main lodge or from lodge to lodge. The trail system itself has warming huts along the way. The rental store provides a complete selection of state-of-the-art equipment while the retail store sells specialized ski clothing and accessories.

The Importance of Staff: More important are the people who add to the customer's experience at Royal Gorge. Their guides are from all over the world, and are hired based on being friendly, talented and good instructors, as well as being committed to guests having a good time. Ski hosts, who are made easily recognizable by their clothing, give directions and advice throughout the day and ski patrollers with radios help those in need throughout the trail system. To ensure a gourmet meal experience, their chefs have been trained in France.

Targeting Specific Market Segments: Royal Gorge has also identified target markets to which it specifically caters. Individual log cabins with jacuzzi tubs and fine dining target couples looking for an active, yet romantic getaway. The emphasis on safety as well as development of a family centre in the main facility targets families.

4.11 2X2 Touring

This activity focuses on driving and sightseeing, both on highway and in cities/towns. While this type of touring is primarily self-guided, guided bus and motorcoach tours will also be considered. In the US, 56.6 percent of the population reported to participate in sightseeing, and participation increased by 39.5 percent from 81.3 million participants in 1982-1983 to 113.4 million participants in 1994-1995.[65]

4.11.1 Customer Profile/Market Segmentation

4.11.1.1 Overall Demographics

The following data was compiled from 1998 BC visitor studies[66]:

Market Origin	Sightseeing as primary purpose	Participate in Events	Visit Attractions	City Sightseeing	% Expenditure on Packaged Tours	*Mode of Transport while in BC*		
						Car/ Motorcycle	Bus/ Motorcoach	RV
BC Residents	5%	11%	33%	-	-	86%	5%	4%
Western Canada	14%	33%	58%	67%	6%	85%	9%	9%

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[65] National Survey on Recreation and the Environment, 1994-1995.

[66] British Columbia Visitor Studies, BC Tourism, 1998.

Eastern Canada	20%	32%	73%	83%	11%	86%	21%	4%
Regional US	18%	28%	67%	77%	10%	82%	8%	7%
Long Haul US	39%	24%	81%	83%	19%	69%	20%	9%
Europe	29%	37%	72%	71%	23%	65%	38%	12%

In general, the further a tourist came from, the more likely sightseeing was the primary purpose of the trip. Visitors from Europe, long-haul US and Eastern Canada are also more likely to visit sightseeing attractions and to spend a greater proportion of their money on packaged tours. Since many of these tours are offered with bus or motorcoach as transportation, it stands to reason that the long-haul US and European visitors are also more likely to use buses for transportation. By far the majority of visitors use car or motorcycle for transportation while in BC, suggesting that most visitors take self-guided sightseeing trips.

No data for sightseers or 2x2 touring travellers was available. Since 14 to 39 percent of non-resident visitors (as per the above table) stated that sightseeing was their primary purpose for visiting BC, the overall demographics for visitors to BC was used as a proxy for characteristics for 2x2 touring travellers.

Non-resident visitors to BC had the following characteristics:[67]

- An average age of 47 with 45% between 35 and 54.
- Evenly split between male and female.
- Very likely to have some post-secondary education (79%).
- Mostly middle to upper-income (80% over $40,000).
- Travel alone (44%) or with one other adult (36%).

Resident visitors to BC had the following characteristics:[68]

- An average age of 42 with 41% between 35 and 54.
- Evenly split between male and female.
- Likely to have some post-secondary education (59%).
- Mostly lower to middle-income (81% $80,000 and under).
- Travel with one or two other adults (62%) or with children (20%).

In the US, sightseeing participants took an average of 9.1 trips per year, with each trip begin just under 2 days.[69]

4.11.1.2 Independent versus packaged tour travellers

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[67] British Columbia Visitor Study – The Report on Visitors to BC – Provincial Overview, BC Tourism, 1998.

[68] British Columbia Visitor Study – The Report on Visitors to BC – Provincial Overview, BC Tourism, 1998.

[69] National Survey on Recreation and the Environment, 1994-1995.

As mentioned above, the further travellers have come from, the more likely they are to participate in a guided, packaged tour. These travellers value the knowledge of the area by the tour company and the convenience of being able to see all of the major sights without significant planning. Packaged tour travellers are willing to pay for the convenience of having most of their sightseeing, transportation, accommodation and food arranged for them. Independent travellers value the flexibility and privacy of travelling on their own according to their own schedule. They may have planned a detailed itinerary before arrival, or plan their trip along the way, enabling them to experience certain venues for longer periods of time (perhaps with unplanned overnight stays).

4.11.2 Key Trends and Issues

Issue/Trend	Implications
Communities and tour operators along a particular route or in a given area are coordinating their marketing efforts to attract tourists.	In order to compete in the tourist market regionally and world-wide, BC communities will need to find ways to co-ordinate their development and marketing efforts that emphasize an area's distinctive features in order to draw tourists.
There is an increasing commitment to preserving an area while developing roads for improved access. Corridor Management Plans (CMP) are being used to establish clear guidelines for development and activities along a route.	While infrastructure development is important for tourism, communities and operators will need to also be aware of the need to act in a way that conserves and protects the area for sustainable development. There is a need to encourage input from various parties and develop a cohesive strategy for tourism along the touring route.
Internet websites for tourist associations are being used to provide information that allows individual tourists to plan their own itineraries and make bookings for accommodations in advance.	Tourists will be able to develop self-guided tours. There will also be a need for supporting material and interpretative/sightseeing facilities along the touring route to support this self-guided activity.
The BC Ministry of Transportation and Highways is planning on increasing their capital investment in highways to $490 million, up $100 million than in 1998/99.[70]	There will be an increasing opportunity to obtain funding for highway development and improvement projects that could increase tourism in a region.

4.11.3 Product Components and Key Success Factors

Product component	Key success factors	Levers for success

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[70] www.gov.bc.ca/th/min, Ministry of Transportation and Highways website.

Product component	Key success factors	Levers for success
Highway and Roads	Well-maintained and safe. Good signage. Scenery and points of interest. Low congestion.	Developing highways in scenic areas with regular points of interest en route. Having clear signage throughout the route. Developing an adequate number of lanes for the traffic volumes.
Sites of interest and pullouts	Well-signed. Good access from road. Adequate parking. Interpretive information (signs and/or pamphlets).	Having clear signage that gives ample time to prepare for exit from highway. Developing pullouts at regular intervals throughout the route.
Maps and information guides and pamphlets	Easy to obtain. Includes suggested itineraries and/or routes. Provides information on food and accommodation.	Developing these maps/guides in cooperation with communities and operators throughout the route.
Food and Accommodation	Well-signed and promoted in maps/guides. Available at regular intervals. Suitable for targeted customers.	Identifying target customers and catering to their needs. For example, if there are mainly families driving on this route, having motels and restaurants suitable for children as well.
Gas and service stations	Well-signed. Available at regular intervals.	Ensuring self-guided tourists are well aware of services available before they begin the trip.
Transportation	Reliable, comfortable vehicle. Hotel pickup and drop-off.	Ensuring vehicles are well-maintained and operated in a safe manner.
Guiding and interpretation	Regularly scheduled sites of interest. Variety of activities at scheduled stops.	Hiring personable, knowledgeable guides. Planning regular stops along the way for meal and rest breaks and sightseeing.

4.11.4 *Case Studies of Best Practices*

4.11.4.1 Case Study #1: The Great Texas Coastal Birding Trail

The project to begin a birding trail along a Texas coastal highway began in 1993 with a vision to have over 300 birding sites, none more than a 30-minute drive away from another, linked along a single route. It was to be a joint venture between the Texas Park and Wildlife Department (TPWD) and the Texas Department of Transportation (TxDOT). The project would take advantage of the many existing birding sites, as well as encouraging the development of new sites. In 1995, the trail was officially opened with 95 birding sites.

Developing the Infrastructure

This project has required many site enhancements and development of turn-outs and viewing platforms with funding provided by TxDOT. Each site along this 500-mile coastal highway trail has a special sign with the trail's universal logo of a bird and a number corresponding to one on the widely-distributed trail guide map. The guide also includes information on birding, as well as on food and accommodation.

A Coordinated Development Effort

From the beginning of the project, the communities along the trail were actively involved. Public meetings were held to inform and enlist the participation and support of local communities, private landowners, industry and businesses. TPWD was responsible for the overall coordination of the project while TxDOT provided the funding and implemented on-ground improvements.

A Coordinated Marketing Effort

In addition to a trail guide, marketing includes a trail-sponsors program, trail products and events, a quarterly newsletter, computer link-ups, and a quality trail-experience. Marketing and trail maintenance is coordinated by TPWD through communities and siteholders. Communities are also educated on how best to cater to the birdwatcher tourists and increase tourism generally. The marketing effort is managed through the Trail Marketing Committee with representation from all communities to coordinate promotion.[71] Each spring, the Great Texas Birding Classic tournament is held.

4.11.4.2 Case Study #2: The All-American Road Designation

In 1995, the US Department of Transportation began a program called the National Scenic Byways Program to as a means of increasing tourism, stimulating local economies and protecting distinctive features along highways and roads. Through this program, two designations were created - National Scenic Byways and All-American Roads – to identify the nation's best highways for tourists. In order to achieve the National Scenic Byway designation, a highway had to have at least one of the following six qualities: scenic, historical, cultural, natural, archaeological and/or recreational. An All-American Road must have at least two of these qualities and be considered a tourist destination unto itself with features found nowhere else. Additionally, these roads must be passable by two-wheel drive vehicles and allow for cyclists and pedestrians. In order to be nominated for a designation, the highway must first complete a Corridor Management Plan with guidelines for development, maintenance and preservation of the area, and also have broad-based support from each communities' residents, businesses and agencies along the route. As a "stepping stone", a state will also have a State Scenic Byway designation, which is required before the route can be considered for a national designation.

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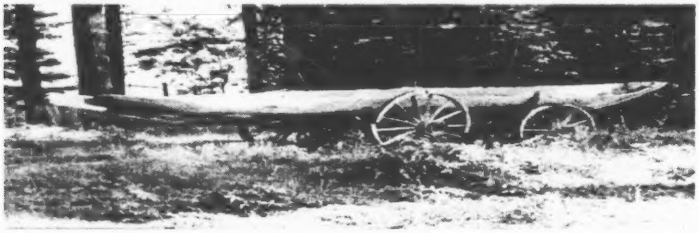
[71] Nova Scotia Marine Tourism Study, p.41, The Economic Planning Group of Canada, 1997.

Case Study #3: The Pacific Coast Highway, California

The Pacific Coast Highway or Highway 1 in California is one of the most scenic routes in the US and has earned the designation of All-American Road. This 72-mile stretch of highway travels north-south along California's pristine coastline from San Luis Obispo to Monterey. While it can be driven in 4 hours, there are many opportunities to sightsee along the way over several days. The highway features many lookouts, small towns and state parks along the way with outstanding scenery. The highway has made the coastline very accessible, but development has been controlled to preserve the pristine views and environment.

Protecting a Valuable Resource: The Coastal Act

The State of California, through the Coastal Act, has ensured that development along the coastline is done in a thoughtful, planned way. The Coastal Commission is the regulatory body acting on behalf of the state. However, each community is given authority to issue permits for new initiatives through local coastal programs (LCPs), with only appealed decisions being forwarded to the Commission. This has successfully allowed local input into development decisions for increased access and enjoyment of the coastline while preserving the unique nature of the route. In particular, communities have not succumbed to pressure to expand the highway to four lanes.



Dugout canoe at Tsayta Lake Lodge
Photo from David Nicolson

4.12 Culture Interpretation

Aboriginal tourism is one of the fastest growing sub-segments of tourism in BC. From 1984 to 1994, the number of aboriginal tour operators in the province increased from 80 to 182,[72] and then up to 250 in 1998.[73] Revenues from aboriginal tourism are projected to grow from an estimated $270 to 400 million in 1998 to $500 million by 2006.[74]

This activity profile includes tours and heritage sites that focus on the history and culture of the First Nations people. It is a subset of the aboriginal tourism market, whose statistics often includes all aboriginal tour operators, regardless of whether the product/service offering has an aboriginal cultural component. Aboriginal culture interpretation does not include nature-based adventure tours, accommodation and casinos owned and operated by first nations.

4.12.1 Customer Profile/Market Segmentation

4.12.1.1 Overall Demographics

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[72] "Masters of Ceremony", Westworld, p.44, Summer 1994.

[73] "Natives, Tourism BC forming partnership", The Vancouver Sun, D15, July 30, 1998.

[74] Ibid.

According to a 1994 study[75], the aboriginal cultural tourist is:

- Between 25 and 55 years of age.
- Higher-educated.

The following data was compiled from 1998 BC visitor studies[76]:

Market Origin	Visit Attractions	Visit First Nations Attractions
BC Residents	33%	9%
Western Canada	58%	18%
Eastern Canada	73%	25%
Regional US	67%	20%
Long Haul US	81%	34%
Europe	72%	43%

In general, the further a visitor came from, the more likely they were to visit First Nations attractions, as shown by the high percentage of visitors from Europe, long-haul US and Eastern Canada. Europeans, particularly Germans, and Japanese tourists have shown a high degree of interest in Canada's First Nations people.

4.12.1.2 Independent versus Packaged Tour Travellers

The further travellers have come from, the more likely they are to participate in a guided, packaged tour. These travellers value the knowledge of the area by the tour company and the convenience of being able to see all of the major sights without significant planning. Packaged tour travellers are willing to pay for the convenience of having most of their sightseeing, transportation, accommodation and food arranged for them. Capturing this segment requires marketing to the tour operators to include a particular cultural site and/or tour as a part of their package.

Independent travellers value the flexibility and privacy of travelling on their own according to their own schedule. They may have planned a detailed itinerary before arrival, or plan their trip along the way, enabling them to experience certain venues for longer periods of time (perhaps with unplanned overnight stays). More effort is required to market to the independent traveller segment since this group is more dispersed and varied than the packaged tour segment.

4.12.1.3 Active versus Passive Participants

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[75] Aboriginal Culture Tourism: The Market, Bernard Campbell, 1994.

[76] British Columbia Visitor Studies, BC Tourism, 1998.

Active participants look to participate in workshops that increase their understanding of native culture. This can include arts and crafts, such as wood carving, or wilderness trips with native interpretation. Passive participation includes viewing of interpretive displays and demonstrations as well as shopping for arts and crafts.

4.12.1.4 Diverse/General versus Focused Tourist

The diverse or general tourist participates in aboriginal culture viewing as one of many activities on a trip. Participation is based on the fact that the aboriginal site or tour is on the touring route as opposed to seeking out the site as a destination unto itself. The bus tour companies generally target this segment, although theming is becoming increasingly popular, with tours focused specifically on aboriginal culture being offered.

The focused tourist, on the other hand, has as his or her main purpose to learn about and participate in aboriginal culture. This segment consists of approximately 25 percent of tourists.[77] Focused tourists tend to look for more active opportunities, as per the active participant profile above, and authentic, as opposed to re-created sites and artifacts.

4.12.2 Key Trends and Issues

Issue/Trend	Implications
Aboriginal tourism businesses are increasing in number throughout the province in this growing industry.	There will be a need to ensure that adequate training is provided to operators starting these businesses and a standard of quality is maintained. As the number of businesses increases, differentiation beyond providing a culture interpretation experience will become more important.
There is a need for a co-ordinated effort amongst tourism operators and the First Nations people to ensure that aboriginal tourism is developed in such a way as to effectively promote their culture in an interesting, yet sensitive, manner. Tourism BC has signed an accord with the Aboriginal Tourism Association of BC to help develop and promote aboriginal tourism in the province. The association is also developing an accreditation program to ensure quality standards amongst aboriginal tourism businesses.	Tour operators will need to work with the Aboriginal Tourism Association in order to meet and exceed their accreditation standards. It will also be important for them to work together in promoting BC as a destination for tourists worldwide.

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[77] Aboriginal Culture Tourism: The Market, Bernard Campbell, 1994

Issue/Trend	Implications
There is a potential conflict between increasing accessibility to native culture and maintaining authenticity of the product and respect the First Nation's request for privacy.	No initiative should be undertaken without consultation with the First Nations elders to ensure proper display of their culture. In some cases, this may result in not displaying artifacts that are particularly sacred to their culture, or disallowing tourist audiences for traditional ceremonies.
Many aboriginal tourism businesses have lacked funding and business expertise and therefore have been unstable. Mainline tour operators seek stable, high-quality tours and sites to include as a part of their packages.	Training programs and joint ventures with experienced tour operators can be used to ensure that these businesses are well-managed from their inception. A sound business plan can be used to attract adequate investment up-front, which is critical for developing a high-quality, viable operation.
Casinos are becoming an increasingly popular way for First Nations groups to generate tourism revenue.	In order to promote other tourism activities such as cultural interpretation, there is a need to develop a full cost-benefit analysis of the alternatives, including social costs on both the area residents and tourists.
There is a need to increase the training and education of aboriginal youth to develop and sustain aboriginal ownership and operation of tours and venues. Programs currently offered to meet this need include the BC government's Visions for the Future, a series of career development conferences for aboriginal youth, and the Royal BC Museum's Aboriginal Cultural Stewardship Program for aboriginal youth interested in working in native culture interpretation.	Having native owners, operators and staff is important both to tourists, who value the knowledge and direct connection with the people who they are learning about, and the local community, who gain the benefits of employment and tourist revenue. While it may be more difficult in the short-term to find the local, trained resources for staff, training locals must be viewed as a long-term investment in both the business and the community.

4.12.3 Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Sites and artifacts	Authentic yet comfortable setting. Significant to native culture. Scenic and/or historic.	Developing those sites and artifacts that are important to native culture and have support from the relevant groups to be displayed. Keeping authentic elements in

Product Component	Key Success Factors	Levers For Success
		development/construction of sites with amenities to increase enjoyment and comfort by visitors.
Guiding and interpretation	Ability to entertain while sharing knowledge and maintaining cultural sensitivity. Interactive displays and activities. Culturally significant.	Hiring native staff who are personable, knowledgeable and passionate about their people's history and culture. Providing training to staff to continually upgrade their communication skills and interpretive knowledge. Developing interpretive displays and pamphlets that supplement the guided tours. Providing opportunities to engage visitors in actively participating in activities and events.
Arts and crafts	Where appropriate, shop for souvenir sales. Interpretive information. Workshops for active participants.	Providing a context (such as stories) for the art being viewed and/or sold. Providing opportunities to participate and interact with artists.
Performances	Authentic yet comfortable setting. Significant to native culture. Entertaining. Interactive.	Demonstrating performances and ceremonies that are important to native culture and have support and input from the relevant groups.
Food	Authentic. Exceed the expectations of visitors.	Providing a unique, delicious meal that the tour will be remembered for.

4.12.4 Case Studies of Best Practices

4.12.4.1 Case Study #1: Khowutzun Native Heritage Centre, Duncan, BC

This facility was opened in 1995 at a cost of $1.2 million. It is owned and operated by the Khowutzun people in Duncan. The centre focuses on First Nations' culture and offers walking tours, a multi-media presentation, art, food, song and dance. The centre employs approximately 15 to 20 full-time staff and 70 part-time staff.

Facilities include a restaurant, gift shop, story centre, carvers' workshop and an arts and crafts gallery. The gallery features high-quality, hand-crafted authentic Native art. Visitors can have a full dinner that includes story-telling or a salmon lunch barbecue. There are demonstrations of totem carving, weaving, silversmithing, beadworking and dancing as well.

Encouraging Participation: Staff at the centre are very open and candid, willing to answer any questions visitors might have. In addition, the centre holds many workshops to allow visitors to actively participate. A program called the Circle of Learning encourages guests to learn by participating in the arts, crafts and traditions of the Khowutzun people.

4.12.4.2 Case Study #2: Hiwus Feasthouse at Grouse Mountain

In 1999, the Hiwus Feasthouse was opened at Grouse Mountain. This project was developed by Grouse Mountain resort in partnership with Richard Krentz, a Coast Salish artist who played a critical role in negotiations with the aboriginal community to gain their support and input. This was the fourteenth longhouse to be developed and built by Krentz, and his involvement in the project gave it credibility and access to the aboriginal community. The challenge was to balance the need for authenticity and respect for tradition and culture of the First Nations people, with modern building, health and safety requirements. As well, the commercial viability of the operation had to be considered. In the end, the longhouse, which can accommodate over 100 people, was successfully built with approval from all stakeholders. An evening at the Hiwus Feasthouse at Grouse features a 5-course traditional meal with native dancing and storytelling. It has been successful thus far, attracting block bookings from major tour operators.

4.12.4.3 Case Study #3: Development of Aboriginal Tourism in New Zealand[78]

New Zealand invested in training to develop aboriginal tourism with the Maori, the indigenous people of New Zealand. This included establishing a Maori tourism liaison office to develop training programs for Maori involved in tourism. These programs were held in Maraes (traditional meeting halls or community centres) throughout the country. In Rotorua, the Whakarewarewa Maori Crafts and Arts Institute has classroom training for tour guides as well as apprenticeships for carving and other traditional arts.

4.13 4X4 Auto / ATV Touring

The off-road vehicle (ORV) market includes all-terrain vehicles (ATVs) and sport-utility vehicles (SUVs or 4x4s) for recreation. For this profile, off-road motorcycling has not been included. ATV tours are generally at most a day long whereas 4x4 tours can be anywhere from one day to over a week. This activity was not included in the 1995 Canadian adventure travel study. Therefore, the statistics used were based on American participation patterns. In 1998, the US participation rate in off-road vehicle use increased from 5 to 7 percent.

4.13.1 Customer Profile/Market Segmentation

4.13.1.1 Overall Demographics

There is very little data available on the demographics of off-road vehicle participants who were not consumers. If it assumed that most participants own their own vehicles, then the demographics for ORV consumers will apply to participants as well.

Off-road consumers are generally:[79]

- Younger with an average age of 37.8 years as compared to the average of 41.2 years for light truck consumers.
- Higher income, nearly twice that of the average US income.
- Have favourite recreational activities of fishing (50.4 percent) and hunting (48.1 percent).

There are opportunities to combine ATV use with other activities.

4.13.1.2 Primary versus Secondary Activity

ORV users either drive the vehicles as a means to support another activity or for the activity itself. Users for whom driving is a secondary activity value the ability of ORVs to access wilderness area much more easily than by non-motorized means to support their hunting, fishing, hiking and/or nature viewing activities. Some users are simply looking to access the backcountry for sightseeing and have no desire to operate the vehicles. For hunters, an ORV also gives them the ability to transport large game out of the backcountry. Many ATV owners are also farmers and loggers who use these vehicles for utilitarian purposes.

Users who drive ORVs for the activity itself seek technically challenging routes and are more likely to modify their vehicles for this purpose.

4.13.1.3 Participant versus Enthusiast

A casual participant in off-road driving or riding may require some preliminary instruction in order to operate the vehicle. The focus of the activity is to access backcountry roads and trails that are not extremely difficult to navigate. The enthusiast, on the other hand, will more than likely bring his own vehicle and seek advanced instruction to push his vehicle to the limit.

Stuart Lake Photo from www.harbour.com/parkscan/fsj

4.13.2 Key Trends and Issues

Issue/Trend	Implications
More off-road trips are being combined with other activities such as fishing, hunting hiking	If looking to make this activity more accessible to a larger market, tour operators will need to

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[78] Native Tourism HR Development Strategy: Final Report, First Nations Tourism Association, 1993.

[79] "Off and On the Road", SEMA News, September 1998.

Issue/Trend	Implications
and wildlife viewing.	emphasize off-roading as a means to an end.
There is increasing resistance to ORV use in wilderness area from non-motorized recreational users and environmentalists.	Further restrictions on the use of ORVs on Crown Land can be expected. ORV tour operators should work with other recreational users and the government to develop trail systems that can be used by ORVs while minimizing the impact on other users and the environment. This may result in designating use areas so the activity can be physically separated from other users.
Safety is still a concern in operating these vehicles. In the past, much attention was placed on the accident rate with ATVs (mainly 3-wheel). ATVs have become much safer, particularly with 4-wheel ATVs now being common place.	Tour operators must continue to emphasize safety in their trips and follow stringent rules to avoid accident and injury.
ORV and ATV use is sometimes associated with rowdy behaviour, excessive noise and hooliganism.	The designation of use areas will help control these types of problems, as will continued product development in which more secondary activities are packaged and sold to ATV/ORV participants.
Road deactivation	Road deactivation by the Ministry of Forests could potentially eliminate some prime product development opportunities. Communities should be working to identify high potential areas and then working with Ministry of Forests for access agreements.

4.13.3 Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Roads/Trails	Good road and trail systems that have low traffic, such as old logging roads. For enthusiasts, challenging terrain of various grades and composition.	Working with other user groups in the community to develop trail systems that minimize conflict and environmental impact. Working relationship with the MoF and local community to prevent road deactivation of high capability roads.
Vehicle Rental	Brand name, quality vehicles that are clean and well equipped for	Purchasing or leasing vehicles that have name recognition.

Product Component	Key Success Factors	Levers For Success
	emergencies.	Actively maintaining vehicles. Providing emergency repair services.
Driving/Riding Instruction	Clear instructions on operating the vehicles with guidance throughout a tour for first-time drivers. If targeting enthusiasts, offering advanced driving camps.	Hiring knowledgeable, personable instructors. Using radio-equipped vehicles to provide ongoing instruction.
Guiding	Good knowledge of the area Interesting features for destinations or stopping points.	Hiring knowledgeable, personable guides. Selecting routes with a variety of features.
Other Activities	Match activity offering with what targeted customers are looking for.	• Clearly advertising the itinerary of the trips and/or finding out about the interests of customers in advance.

4.13.4 Case Examples of Best Practices

4.13.4.1 Case #1: Ecological 4-Wheeling Adventures

Ecological 4-Wheeling Adventures offers 4x4 backcountry tours and classes for both the soft adventure traveller and the off-road enthusiast. Its tours range from a single day up to 12-day expeditions in Mexico's Copper Canyon.

Working with Other Agencies

To differentiate itself from other 4x4 tour operators, Ecological 4-Wheeling Adventures actively promotes ecologically sensitive backcountry travel as a part of all its tours. It is actively involved in promoting 4x4 backcountry travel as a safe and responsible activity. All tours have been approved by the U.S. Forest Service, Bureau of Land Management, Death Valley National Park, and the California Department of Parks and Recreation. Ecological 4-Wheeling Adventures uses only existing, designated trails and radio communication to coordinate vehicle movement. Its guides are all long-time, experienced 4x4 drivers.

4.13.4.2 Case #2: Oregon Dunes National Recreation Area

Oregon Dunes features sand dunes as high as 90 meters along the Pacific Ocean. The area is popular for camping, hiking, horseback riding, fishing, birding and off-road touring. For off-road vehicles, restrictions have been established to protect the environment while allowing access to participants in this recreational activity. There are designated riding areas and routes, camping and staging facilities with sand dune access, and US federal and state regulations. All vehicles require permits from the state motor vehicle department and comply with safety and noise regulations.

These are all outlined in the "Off Highway Vehicle Guide to the Oregon Dunes NRA and Sand Lake".

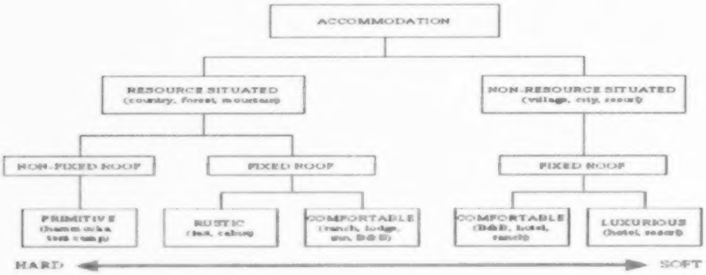
The Sand Dunes Frontier and Theme Park

This off-road tour operator also runs an area with a gift shop, deli, mini-golf course, shooting gallery, and campground with dunes access. Its main attraction is the tours of the dune area on limo rails (dune buggies), ATVs or 4x4s. These tours can cater to both the soft-adventure and thrill seekers with slow, scenic rides to full-speed ones up and down the dunes. There is also the choice of guided tours and self-guided rentals.

4.14 HUT-TO-HUT Touring

Wilderness huts are generally built to support outdoor activities in a given area as opposed to being a tourist destination unto themselves. Originally, these huts were used to provide safe refuge for climbers in high alpine areas, who needed a base to climb from or in the case of inclement weather, emergency shelter. More recently, huts are being designed and built to provide greater access to the backcountry, particularly to the soft adventure market. The key advantage of huts is eliminating the need to carry equipment such as tents and cooking supplies. Within the spectrum of accommodation in the outdoors, huts fall within the "rustic" category:[80]

The activities supported by a single hut can include hiking, climbing/mountaineering, mountain biking, backcountry skiing, snowshoeing and snowboarding. Hut-to-hut systems are generally designed for hiking and cross-country skiing.


ACCOMMODATION
RESOURCE SITUATED (country, forest, mountain)
NON-RESOURCE SITUATED (village, city, resort)
NON-FIXED ROOF
FIXED ROOF
FIXED ROOF
PRIMITIVE (hammocks, tent camps)
RUSTIC (hut, cabin)
COMFORTABLE (ranch, lodge, inn, B&B)
COMFORTABLE (B&B, hotel, ranch)
LUXURIOUS (hotel, resort)
HARD
SOFT

4.14.1Customer Profile/Market Segmentation:

4.14.1.1 Activity Type

No statistics were found as to the use of huts by participants of various activities. Before building a hut, it is important to determine what activities it will support, both in selecting its location and its design. Activities with extra equipment such as kayaking or backcountry skiing will require additional storage space in the hut. This will often be the case since most huts have actually been built by recreational clubs for particular activities. For hut-to-hut systems, the activity will influence the distance between the huts. For example, an activity such as skiing or biking can cover more distance in a day than hiking. As well, huts (or cabins as in Alaska's Prince William Sound) can be built to support kayaking.

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[80] "Greening of Remote Tourism Lodges", Pam Wight & Associates, 1993.

4.14.1.2 Soft versus Hard Adventure

Generally, the soft adventure traveller will value a hut for its comfort, the access that it provides to more remote outdoor area and other amenities such as meals. The hard adventure traveller is likely an active enthusiast in the particular activity being performed, and appreciates the proximity and shelter from the elements in the high alpine or wilderness areas, making more challenging routes possible.

4.14.1.3 Single Hut versus Hut-to-Hut Users

Single hut users will select the hut based on its location vis-à-vis a particular destination (i.e. a climbing peak) or an area (i.e. backcountry bowl for skiing) that suits the level of challenge they are seeking. They will also look for the hut to have a variety of excursions from the hut. Hut-to-hut users will select a hut system based on the variety of features within the area covered throughout the system. They will rarely spend more than one or two nights at a single hut.

4.14.2 Key Trends and Issues

Issue/Trend	Implications
The funding of hut development is a major issue in BC, both for the initial capital investment and the ongoing operating costs. Most public or club huts have depended on donations and volunteers to build and operate. For privately-owned huts or refuges, such as those in France, many were previously farmhouses that were converted into huts, thereby reducing the initial capital cost. As well, these huts are in areas that already had well-developed and popular trail systems – in other words, demand preceded the fulfillment of the need.	Huts can be developed to some extent through volunteer efforts and "sweat equity", but new facilities will have to demonstrate the ability to be somewhat self-sustaining. This will require careful demand assessment among targeted users. Where public huts are projected to operate on a deficit, the shortfall must be made up through other revenue sources, such as fundraising activities and membership dues. In the US, land managers are heavy investors in hut systems. In BC, the Ministry of Forests does not invest in hut development, despite its recreation mandate.
An equally important issue concerns access and use of huts on Crown land, especially by commercial operators.	Typically, huts on Crown land outside of parks have been erected by recreation clubs who have been licensed for such development by the Ministry of Lands. There is no exclusivity of access to or within the huts to facilitate public access. Commercial use is considered unethical unless the operator reimburses for that use or otherwise contributes to maintenance and

Issue/Trend	Implications
	upkeep. There are few instances of hut development on Crown land by commercial operators because of problems associated with vandalism and unauthorized use by the public. As huts would be constructed on an existing trail, access would be available to all trail users. Even if a private operator constructed new trails for a hut or hut system, BCAL is likely to authorize such development through a Licence of Occupation, which would still allow public use of the trails and access to the hut (although the hut itself could be locked). This lack of exclusivity is likely to deter future commercial hut development.
Huts allow for greater access to the backcountry, thereby increasing human activity in previously uncrowded areas.	Hut managers and users must establish clear guidelines for acceptable use and activities and the extent to which they can be done in the area supported by the huts. They must follow practices that minimize the impact on the environment.
Daily maintenance and supply replenishment necessitates proximity to a population centre or a base of operation.	Hut operators can choose either to provide minimal amenities that only need replenishment once in a while, or arrange for regular transport of supplies into the hut, either by motorized or non-motorized means. This will require careful planning to meet the expectations of users once they have been established while not compromising land health.
Enforcing compliance of proper hut use and payment will be a challenge for hut managers.	Hut operators must establish a clear code of conduct and payment schedules. This information should be made available to users before they embark on their trip to the hut. In terms of enforcement, it may be necessary to employ hut wardens for the peak seasons, if not at all times the hut is open.

4.14.3 Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Sleeping quarters	Safe shelter against the environment.	Clearly identifying the purpose of the hut – is it for safety purposes, or for a

Product Component	Key Success Factors	Levers For Success
	Cleanliness. Adequate space for each person.	comfortable stay in the mountains? Encouraging a sense of responsibility and peer pressure to keep the hut clean. Ensuring users understand the accommodation limits and space beforehand.
Toilet facilities	Clean. Environmentally sound.	Designing toilets to minimize impact. Encouraging proper use of the toilets and responsibility of each person to keep them clean.
Other amenities	Supplies for heating, cooking. Prepared meals (for high-end huts).	Publishing exactly what is available at each hut. Ensuring that consumable supplies are regularly restocked. Encouraging conservation and sharing amongst users when supplies are low.
Surrounding area	Variety of terrain and features to meet expectations of users in supported activities. Uncrowded. Good access to the hut. Well-developed trail system for day excursions and to other huts (where applicable).	Obtaining commercial recreation (CR) tenure for the immediately surrounding area. For marine huts, a foreshore lease from BCAL would also be required. Developing trails as appropriate to support the activity and level of activity desired.
Reservation system	Perception of fair allocation. Allow bookings ahead of time. Clear rules for reservations versus first-come, first-served accommodation.	Making use of the Internet to accept and track bookings, which requires minimal staffing once system has been developed. Publishing exactly how spots can be obtained as well as up-to-date information on availability.
Hut management and staff	Friendly, knowledgeable staff. Ability to enforce proper use and behaviour by users.	Hiring staff who are personable, and knowledgeable about the supported activities and local area. Providing separate quarters for staff to give them privacy and "downtime".

Product Component	Key Success Factors	Levers For Success
Transportation	Shuttle services and/or parking to provide access, depending on purpose of the hut. The more transportation made available, the more access provided to the general soft adventure market.	Booking groups in advance in order to maximize use of shuttle services.
Area Information	Accurate weather reports available daily at the hut. Guide maps and interpretive pamphlets/books.	Setting up regular communication to receive weather reports to be posted in a centrally-located bulletin board. Encouraging sharing of information amongst clubs, tour operators and other users. Making information available to users both before the trip and in the hut.

4.14.4 Stakeholder Analysis

Three major stakeholder groups have been identified:

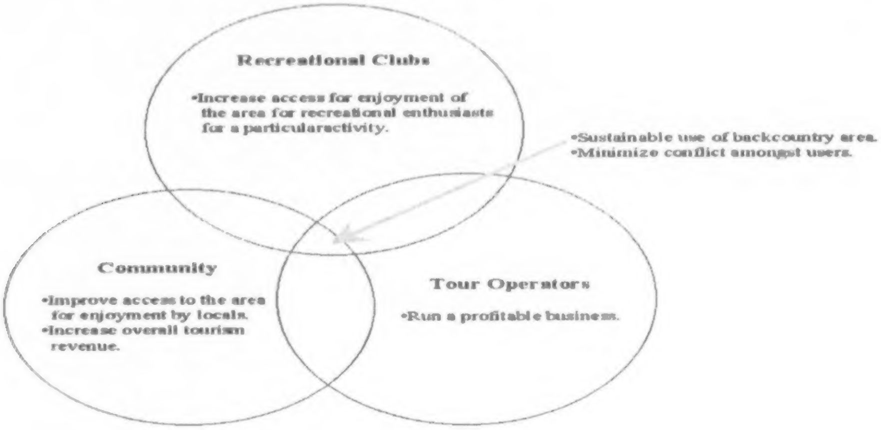
- Community: those responsible for the economic well-being of a city, town or area.
- Recreational Clubs: groups of users generally sharing and promoting a single activity in the local area.
- Commercial Operators: companies running a business to profit from guiding services for users wishing to participate in a particular activity.

The following table outlines the potential benefits and barriers to building a hut or hut-to-hut system from the perspective of each stakeholder:

Stakeholder	Key Benefits	Barriers to Implementation
Community	Increase potential for tourism by promoting activities supported by huts. This will have economic value through expenditures by tourists while in the area. Increase access for local population to participate in recreational activities.	How to ensure that the hut(s) will be self-sustaining.
Recreational Clubs	Lowers the risk associated with the activity, by providing reliable shelter at a known location. Increases accessibility of the area for	Ability to raise capital for initial investment requirement. Ability to raise funds for ongoing operations.

Stakeholder	Key Benefits	Barriers to Implementation
	an activity by reducing the equipment required to be brought in.	Inability to restrict use for its members only.
Tour Operators	Increases appeal of tours to the soft adventure market by providing comfortable shelter in a remote wilderness area. Allows for multi-day trips in remote areas, either using a single hut as a base for multiple excursions or going from hut-to-hut. Hut-to-hut systems also provide operators with more flexibility in dealing with varied customer needs and weather and environmental conditions.	Inability to enforce unauthorized use of the hut. Inability to restrict use of surrounding area for its tours only. For tour operators with smaller operations, ability to raise capital for initial investment requirement.

Although each stakeholder group has inherently different goals, the key to coming up with a sustainable solution, is to find the intersection of goals - or shared objectives. This requires co-operation from all parties.


Recreational Clubs
•Increase access for enjoyment of the area for recreational enthusiasts for a particularactivity.
•Sustainable use of backcountry area.
•Minimize conflict amongst users.
Community
•Improve access to the area for enjoyment by locals.
•Increase overall tourism revenue.
Tour Operators
•Run a profitable business.

4.14.5 Case Examples of Best Practices

4.14.5.1 Case #1: Huts for Hard Adventure Enthusiasts Only

Grupo do los Cien is a non-government, non-profit organization established in 1950 responsible for the building and maintenance of huts in the high alpine in Mexico. Its number one priority is to save lives in high altitudes. Therefore, it has designed huts that are purpose-built for climbers and mountaineers and not necessarily comfortable. All huts are first-come, first-served and there is no usage fee. In order to fund these huts, individual mountaineers, corporations and institutions have donated time and money.

Contrast this with the goals of the Alaska Mountain and Wilderness Huts Associations:

"To be a broad-based membership organization which offers a system of linked, back country huts. Through systems like these, the Huts Association will provide diverse wilderness experiences and levels of physical difficulty to a wide range of ages and abilities. Services will be provided at a moderate cost, comparable to other hut systems found internationally, so as to reach a broad spectrum of users.

Trail systems will be primarily for hikers and cross-country skiers but might also include use by horse riders, mountain bikers, mushers, hikers with pack animals (dogs, horses, etc.). A hut system might also use water routes. When possible, we are committed to the development and maintenance of through-trails, for a genuine 'hut-to-hut' experience, of no more than moderate difficulty. A typical trail configuration might include a very easy section nearest the trailhead, to accommodate day use, and difficult side trips in the back country."[81]

4.14.5.2 Case #2: Reservation System at 10th Mountain Division Huts, Colorado

This hut-to-hut system is perhaps the most famous and popular one in North America. Funding was initially obtained from the US Forest Service for the first two huts 15 years ago. The agreement was that if the huts did not reach certain usage targets within 5 years, they would be torn down. Having met those targets, the system has since been expanded to 12 huts.

The huts are booked to capacity, with no overflow camping allowed. Therefore, users must have a reservation before starting their trips. In order to deal with the overwhelming popularity of these huts, 10th Mountain started a lottery system for its members in March of each year. In April, members can begin making reservations for the following winter. Starting in June, the general public can make their bookings, however by this time, most of the winter months will have been completely booked.

In order to facilitate the reservation process, 10th Mountain has made up-to-date hut availability and payment over the Internet. Since its huts are not staffed, payment is required by credit card before the booking can be completed. The website also allows people to exchange or sell spots that they will be unable to use.

4.14.5.3 Case #3: The Use of Privately-Owned Huts by Terra Trek

Terra Trek, which organizes trips using huts in Arizona does not own huts or guide tours. It services the huts or cabins for a service fee to prepare the hut prior to use by a group and to clean the hut following their stay. No rental fees are paid to the owners of these remote cabins. Users can stay at a cabin for up to 3 nights and go on a hut-to-hut trip.

The services provided by Terra Trek include setting up the site for security lock preparation, water, power, food, bathing and sleeping accessories and trash removal. Terra provides complete reservation services for the cabin owners as well as screening of groups using the cabins to ensure they are well-maintained.

4.14.5.4 Case #4: Funding Ongoing Hut Operations

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[81] www.alaskahuts.org

The Appalachian Mountain Club (AMC) is a non-profit organization that runs a set of "full-service" huts in the White Mountains, New Hampshire. While charging for the use of these huts, there is still a significant shortfall in operations – in 1997 costs exceeded revenues by $947,000. However, the AMC has found ways to fund this shortfall by supplementing its revenues through membership dues, fundraising events, and outdoor education workshops that are usually held at the huts.

Fort St. James

Photo from www.princegeorge.com/tourism/fortstjames

4.15 Mountaineering / Climbing

This activity profile includes both mountaineering and climbing. Generally, mountaineering occurs at higher elevations than climbing and involves traversing feature such as glaciers – however, these activities are not necessarily mutually exclusive. Climbing has several sub-categories that include ice, big wall and sport climbing as well as bouldering.

4.15.1 Customer Profile/Market Segmentation

4.15.1.1 Overall Demographics

According to a 1995 Canadian study[82], ice and rock climbers have the following characteristics:

- Younger, with 67.1% being 34 and under.
- Predominantly male (63.1%).
- Travel solo (78.0%).
- From Canada (84.0%).[83]

Geographic Region	Percent of total participants (1993)
BC	12.1
Ontario	30.7

Geographic Region	Percent of total participants (1993)
US	12.7
UK	0.8

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[82] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, p.3-31, The Randolph Group, January 1997.

[83] Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p.48, 1995.

Rest of Canada	41.2	France	0.1
Canada (total)	84.0	Germany	0.6
		Japan	1.3

A 1997 study in the US[84], mountaineering and rock climbing categories largest age group segment was 16 to 24 year olds with nearly one-third of all participants.

4.15.1.2 Participation by Climbing Type

A 1997 US survey[85] ranked the participation rates of climbers in various types of climbing/mountaineering. These do not add up to 100 percent since climbers often participate in more than type of climbing activity. However, they do reveal the degree of popularity of each:

Activity	Percent of total participants
Tradition rock climbing	84
Indoor climbing	71
Sport climbing	58
Alpine mountaineering	45
Ice climbing	28

One conclusion which can be drawn is that those activities which are more accessible, both in terms of location and cost, and subject to less risk, are more popular. Alpine mountaineering and ice climbing requires more expensive equipment and is done in less accessible areas or limited by the need for specific conditions.

4.15.1.3 Participant versus Enthusiast

The enthusiast has been defined as the most active one-third participants by number of times they participate in the activity. By this definition, they are more likely to provide opportunities for repeat business for tour operators, but at the same time, more experienced enthusiasts are more inclined to set out on their own. If using a guide, they will look for technical instruction and the experience and ability to make difficult, well-informed decisions. Enthusiasts also go on longer trips – while they spentmountaineering and 78 percent of days rock climbing.[86] Participants, on the other hand, are looking to focus on the physical and mental challenge, as opposed to develop technical expertise in areas such as knot-tying. Participants are using guides as a way of gaining access to an activity they do not conceive of being able to do on their own. They are looking for the guide to ensure their safety and reduce the risk of the activity and the need to go through a steep learning curve to perform the activity. In many cases, participants see this activity as a one-time experience, although sometimes the enjoyment of the experience may result in participants looking to become enthusiasts. Participants generally do not do as much research before arriving at the destination, relying instead on the operator to have this information readily available.

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[84] Human Powered Outdoor Recreation, State of the Industry Report, Outdoor Recreation Council of America, 1997.

[85] ORCA Outdoor Industry Distribution Study, Leisure Trends Group, 1997.

[86] Human Powered Outdoor Recreation, State of the Industry Report, Outdoor Recreation Council of America, 1997.

4.15.1.4 Soft Adventure versus Hard Adventure

The soft adventurist is looking to enjoy the remote, alpine environment without undue hardship or risk. They are generally older (baby boomers), who are willing to pay for comfortable lodging and other amenities, while getting the feeling of personal challenge through an activity in the mountains.

Hard adventure travellers desire a natural, less-catered experience which includes less comfortable shelter such as tents and less dependence on mechanical support. These participants are generally younger,

outdoors enthusiasts.[87]

4.15.1.5 Risk versus Insight Seeker[88]

Risk seekers participate in mountaineering and climbing as a way to encounter situations where there is significant uncertainty bringing about the potential for danger or failure. A much more significant and saleable market segment from a tourism perspective is the insight seeker. These individuals look for personal insight or enlightenment from a challenging experience that has risk as an inevitable by-product. The desire is to minimize the exposure to risk, while maximizing the challenge for themselves.

4.15.2 Key Trends and Issues

Issue/Trend	Implications
There has been a significant increase in the popularity of indoor climbing. In 1996, 71 percent of Climbing Magazine readers reported to be participating in indoor climbing. (Cimbing Magazine Reader Survey, 1996)	This will result in increasing popularity of sport climbing and bouldering. Operators in these activity areas will need to deal with overconfidence or lack of technical skill for those climbers moving from indoor to outdoor climbing.
User fees, in various forms, are being employed more often throughout the US as a part of the	If implemented in BC, operators should work with government agencies to ensure that user

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[87] The Sea to Sky CBR Opportunities Study, p.46.

[88] "Mountain Madness: Guided Mountaineering in New Zealand's Southern Alps", Trails in the Third Millennium, p.29, December 1997.

Issue/Trend	Implications
Fee Demonstration Program. This has been in response to budget cuts for various agencies.	fees are being used to maintain and/or develop the areas in which they are being collected.
There is a high demand for safety in mountaineering/climbing that is inherently risky. At the same time, the activity is becoming more mainstream, with customers looking for instant gratification by achieving a tangible goal such as summiting a peak.	Operators must ensure that they fully understand their customer's objectives and screen out those who may compromise safety of themselves and other customers. As well, operators much provide adequate instruction to minimize and deal with the risks involved, and establish reasonable expectations for their customers.
Mountaineering has been made more accessible through the use of helicopters, snowmobiles and glacier ski planes.	Again, operators must ensure that the mountaineering experience is within the ability level of the customers. Operators using motorized transport must be prepared to work with environmentalists and other users in the area to avoid conflict.

4.15.3 Product Components and Key Success Factors

Product Component	Key Success Factors	Levers For Success
Mountain or rock/ice face	Challenging yet doable climbing routes. Features, especially the summit for mountaineering. Weather and snow conditions. Uncrowded.	Planning routes that take advantage of local features and views without compromising safety. Scheduling trips during time of day and year where conditions are most agreeable. Securing tenure for the trip area, if possible.
Mountain transportation	Easy access to and from base of climb.	Providing transportation as a part of the overall tour package.
Guiding and Instruction	Emphasis on safety. Ability to gauge ability and energy level of each customer. Experience and judgement in making smart decisions. Tolerant and instructive guides. Challenging customers to experience self-fulfillment (insight seekers).	Hiring experienced, personable guides/instructors with certification in mountaineering, first aid, medical and leadership training. Training guides/instructors to keep up-to-date in safety procedures, first aid and soft skills. Selecting routes appropriate for customers that provide challenge

Product Component	Key Success Factors	Levers For Success
		without undue risk. Establishing publicized rules and procedures for behaviour and decision-making during the trip.
Food and Accommodation	For soft adventure, comfortable lodging. For hard adventure, good campsites for tents. Meals that exceed customer expectations.	Targeting specific segments and providing accommodation/shelter and food that caters to their needs/desires.

4.15.4 Typical Operator Characteristics

Canadian tour operators offering climbing as the major activity had the following characteristics in 1993:[89]

Average length of trips in days	4.7
Average number of employees	3.9
Gross revenue per operator	$93,578
Average gross margin	12.9 %

4.15.5 Case Examples of Best Practices

4.15.5.1 Case #1: Ensuring Safety Before the Climb

Rainier Mountaineering Inc. (RMI) is Mount Rainier's oldest and largest guide service. It has a developed a strong reputation throughout North America. Its most popular trip is its 3-day Mount Rainier summit package. This includes a mandatory day of climbing school prior to the climb. It serves not only to provide all participants with the basic skills and safety knowledge for summiting the mountain, but also as a way of screening out those who would not be able to perform to the ability required to ensure the safety of everyone involved. At the end of the one-day course, all participants must pass a test in order to be allowed to continue on with the actual climb. In spite of these measures to increase safety by ensuring a minimum skill level of participants, RMI has still experienced some serious incidents on its climbs. Mountaineering operators can only minimize risk, not eliminate it and this must be understood by all.

4.15.5.2 Case #2: Catering to the Participant versus the Enthusiast

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[89] Adventure Travel in Canada: An Overview of Product, Market and Business Potential, p.31, 1995.

Canadian Mountain Holidays (CMH) is a tour operator that provides guided mountaineering in alpine areas accessed by its helicopters. It caters to the soft adventure participant, emphasizing the comforts of its lodges and gourmet meals, with an opportunity to "experience" the mountains and the thrill of summiting, as opposed to learning the hard, technical skills of mountaineering and climbing.

On the other hand, Yamnuska, Inc., a mountaineering school and guiding service based in Canmore, Alberta, provides beginner to advanced courses in mountaineering, rock and ice climbing. For its more advanced courses, it will have a 2:1 client to guide ratio. In targeting the enthusiast, it uses tent camping as a means of shelter. Its guides will work with clients to develop custom trips and provide technical instruction throughout the trip, in addition to sound decision-making from their training and past experience. The enthusiast clients are given the opportunity to plan more of the trip, if they wish.

4.16 Dog Slegging

Dog sledding involves the pulling of a sled or toboggan by a team of harnessed dogs. The sled may carry passengers or goods, and is operated by a dog handler. Sledding excursions may last less that a day or involve a multi-day wilderness journey[90].

In a survey designed and conducted by Statistics Canada[91] (with input from Tourism Canada), it was indicated that 19 Canadian tourism operators derived most of their revenue from dog sledding — most in Quebec (9) and the Yukon (5). It was also offered as a secondary activity by 38 other adventure travel operations primarily involved in snowmobiling (79%). Sledding operation have been in business for an average of over 10 years, although 68% for less than 6 years. In total, they generated approximately $1.0 million in tourism revenue — a significant increase of 34% over 1992, and all operators expected business to grow.

The average gross revenue was $54,551 in 1993, significantly lower than the sector average of $246,821, which confirms that this activity is highly seasonal. Gross profits totaled $257,000 for an average of $13,526 per operation. High average growth revenues combined with low average operational expenses contributed to the high average gross margin (24.8%).

Dog sledding operations accounted for over 7,277 traveller-days in 1993, and only 15% of travellers had previously chosen the same firm. Of all packages, most (84%) lasted longer than a day and 53% were sold through a pre-set package with an average length of 6 days and an average price of $192.67 per day. Many (47%) use professionally certified travel guides.

Dog sledders tend to be[92]:

From other countries — with ¾ of the market drawn from outside North America	Fairly evenly distributed among different age groups with over 65% being between the ages of 20 - 44

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[90] Cited in: Adventure Travel in Canada: An Overview of Product, Market and Business Potential, Tourism Canada, Canada Directorate, February, 1995

[91] undertaken in March, 1994

[92] Adventure Travel and Ecotourism in Canada: Strategic Framework for Development, Technical Appendix – Product and Market Analysis, Canadian Tourism Commission, The Randolph Group, January, 1997.

Mostly female (65.4%)	Travelling in couples (42.4%) or solo (11.2%)

Fort St. James Photo from www.parcscanada.gc.ca/schoolnet/pcimages

5 OPPORTUNITIES

5.1 Nordic Skiing/Ski Touring

Regional Development Considerations	• Terrain and resource attributes can vary widely; success is closely associated with how the operator or the community provides the service. • Good terrain for this activity is also likely to be valued by snowmobilers and could, therefore, face competitive use pressures. • Ski touring may be associated with a hut or lodge-based operations. • Challenge of variable winter conditions with cold weather a significant inhibitor to attracting non-domestic visitors.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Fort St. James, Pinchi, Yatzutzin, Mt. Pope, Stuart / Trembleur, Necoslie	• Day use nordic skiing / ski touring: Frontcountry and Murray Ridge • Day use nordic skiing: trails and roads between Pinchi and Tezzeron Lakes	• There has been little market or product development. • Taking advantage of existing facilities and infrastructure would facilitate development. • Link to existing 15 km X-C trail network at Murray Ridge. • Terrain for all levels. • High degree of access from community.	• Hut systems • Lodges/resorts • Family ski packages	• Promote product development and potential activity site locations to operators / entrepreneurs. • Assess potential for future conflicts with mechanized users, particularly snowmobilers. • Link with activities and events organized through Nordic Ski Club.
Yatzutzin, Inzana,	• Multi-day ski touring related to Heritage Trails	• Potential loop tour following Tezzeron and Wittsichica Creeks to Nation Lake and returning via Witch, Mudzenchoot, Inzana,	• Hut systems • Lodges/resorts • Other winter	• Re-locate/develop trail. Much of the historic trail follows the North Road.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Mudzenchoot, Tsilcoh, Lower Nation		Hatdudatehl (Chuius Mtn.) and Tezzeron Lakes. • Many private cabins on east end of Chuchi Lake.	activities • Heritage	• Tie into established lodges to promote winter product. • Establish huts as required. • Assess potential for conflicts with mechanized users and resource sectors.
Stuart River, Necoslie, Salmon, Tsilcoh	• Single and multi-day nordic skiing: Trail development along Stuart, Necoslie and Salmon Rivers • Husdon Bay Bridge Heritage Trail (multi-day)	• Flat to rolling terrain well suited to this activity. • Heritage linkages – historic travel routes • Highly accessible. • High levels of use by snowmobilers; potential for conflict. • There has been little market or product development. • Many small lakes of interest for ice fishing and Wildlife viewing. • Eskers found in north of area (Salmon River) may be suited to trail development.	• Hut systems • Other winter activities • Heritage	• Ensure future road access before promoting or packaging services. • Locate and develop trails, starting with heritage trail. Establish hut network, approx. 1 days travel apart. • Explore linkages to Prince George District. • Tie hut / trail development to summer activities to maximize return on capital and minimize conflicts with resource sectors. • Promote product development and potential locations to operators/entrepreneurs.
Grassham, Sowchea / Cunningham	• Day use from existing trail network / FS sites	• Variety of terrain from lakes (Grassham, Camsell, McNab, Marie, Nanna) to Mountains (Shass, Bud, Nielsp).	• Hut systems • Other winter activities	• Promote tourism usage. (Increase regional presence). • Maintain trails. Establish support facilities. • Maintain viewpoints and work to minimize conflict with resource sectors.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
				• Work with interested parties to ensure road access maintained.
Stuart / Trembleur, Flemming, Tanizul	• Multi-day loop tour (Stuart L, Tachie R, Trembleur L, North Arm Stuart L.)	• Potential route spans variety of resource management zones. • Tachie River is a major corridor and has historic significance. • The route goes through a variety of terrain and vegetative classes.	• Lodges/resorts • Hut systems • Other winter activities • Heritage	• Promote product development and potential activity site locations to operators / entrepreneurs. • Work with Parks for route through remote Flemming RMZ. • Locate route and establish supporting facilities (huts etc) as required.
Stuart / Trembleur, Takla/Middle, Kloch, Blanchet, Mitchell, Takla Lake	• Day use from resorts or FS sites • Linking routes between resorts or huts	• Difficult to access in winter. • May require motorized access (helicopter, snowmobile, and ski plane). • Mixed terrain and vegetation. • Centered in most recreationally significant region in FSJ district.	• Lodges/resorts • Hut systems • Other winter activities • Air activities	• Determine level of desire among area resorts/entrepreneurs for development.
Nation, Lower Nation	• Multi-day tour following summer canoe route	• A similar product has been used recreationally in Bowron Lakes. • Because of isolation, there is a high degree of risk with this opportunity.	• Lodges/resorts • Hut systems • Other winter activities	• Determine level of desire among area resorts/entrepreneurs for development.
Hogem, Omineca, Bait, Takla/Middle	• Develop multi-day trails along transportation routes or historic routes (e.g. Old Hogem Trail/ Kenny Cr., Kwanika Cr., Fall FSR, and Ogden	• Opportunity serviced from Takla Landing. • Generally mixed terrain. Mixture of rugged alpine peaks and gentle slopes.	• Hut systems • Other winter activities • Ski mountaineering	• Determine level of interest in community for development.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
	Cr.) • Ski mountaineering	• Highly scenic mountain ranges. Remnant icefields. • High levels of risk associated with remote nature this area.	• Air activities	
Driftwood	• Develop trail along Driftwood River	• Multi-day opportunity. • Remote, air access required. • Linkages to area hunting lodges/camps.	• Hut systems • Other winter activities • Air activities	• Determine level of interest in community among area resorts/entrepreneurs for development.
Canyon Lake, Damochax, Sustut, Squingula	• Pockets of capability associated with Drift L., Mt. Coccola, Damoshilgwit wetlands, Skeena R. and their associated natural features	• Isolation and difficulty of terrain (for trail development and access) will likely preclude from further consideration.	• Hut systems • Other winter activities • Air activities	• No action suggested.
Upper Omineca, Upper Sustut/ Thumb, Sustut, Driftwood	• Loop tour: Bulkley House, Kaza Lake, Omincetla R., Omineca R., Connelly Range, Bear L, Driftwood R.	• Wilderness loop tour, follows historical routes and potential transportation routes. • Very remote. Air access required. • Could be based from Bear Lake or Bulkley House. • Passes "The Thumb" a 100 m volcanic plug noted as significant by Parks Canada.	• Hut systems • Other winter activities • Heritage • Air activities	• Determine level of desire among area resorts/entrepreneurs for development.
Upper Omineca, Upper Sustut/ Thumb,	• Nordic skiing and ski touring along Sustut R, Bear R., Connelly Range, Omineca R, Kettle	• Glacial features, heritage, wildlife and remoteness create a unique opportunity when combined. • Fishing lodges along Sustut R. could	• Hut systems • Heli-skiing • Other winter	• Determine level of desire among area resorts/entrepreneurs for development.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Sustut, Lower Sustut	Glaciers, Yuen L and eskers, Nanitsch L., Kaza L., Cariboo Heart Range.	provide suitable base. • Some trail and hut development would be required.	activities • Heritage • Air activities	
Upper Sustut, Skeena	• Nordic Skiing: Johanson Cr. • Multi-day wilderness ski touring: Birdflat Cr./ Mosque R./ Bird Hill/ Two Lake Cr. • Loop tour: Whistler Basin/ Carruthers Pass/ Quenada Cr./ Asitka R. • Ski Mountaineering and heli-skiing	• Generally roadless, but all major recreation corridors and potential travel corridors. • Good terrain, sparse vegetation. • Historically significant routes. • Some road access from outside region. • Fishing lodges along Sustut R. could provide suitable base for helicopter assisted activities.	• Hut systems • Lodges/resorts • Heli-skiing • Ski mountaineering • Other winter activities • Heritage • Air activities	• Determine level of desire among area resorts/entrepreneurs for development. • Consider suitability of development of trail/hut network vs. retaining the wilderness nature of the area. • Promote as an area to expand for heli-ski operations.
Groundhog, Skeena	• Ski-touring along historic trails (Jackson Flats, Skeena R.) • Alpine opportunities in nearby glaciers (ski Mountaineering and heli-skiing)	• Considerable historic significance and historic and prehistoric trail junction. • Significant distances, no facilities. • Important wildlife habitat. • Access may be better suited from Hwy 37. • Area joins Spatsizi Plateau Wilderness Park. • BC Railway right-of-way follows Skeena R.	• Hut systems • Heli-skiing • Ski mountaineering • Other winter activities • Heritage • Air activities	• Consider suitability of development of trail/hut network vs. retaining the wilderness nature of the area. • Look into linkages with Spatsizi Plateau Wilderness Park.

5.2 Snowmobiling / Dogsledding

Regional Development Considerations	• There is a considerable amount of snowmobile use in the district. • The activity is growing extremely fast, perhaps more so than any other outdoor activity, motorized or non-motorized. The increased demand and use is coming from residents, regional recreationalists and tourists. According to some, the growth in demand may eventually require curtailments in some areas. • In other districts, conflicts between snowmobilers and other users are among the most intense in the province and will likely deteriorate further before they improve. • Tourism use may conflict with recreational or other commercial use (e.g. snowmobile trails used for maintaining traplines). • Access to suitable terrain and fueling stations are key considerations. • Most of the opportunity areas associated with snowmobiling would also be suited for dogsledding.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Fort St. James, Pinchi, Yatzutzin, Mt. Pope, Stuart / Trembleur, Stuart River, Necoslie, Salmon	• Snowmobiling – day use (guided/unguided) • Trail development along rivers / around lakes (including Stuart R. and Necoslie R.) • Main opportunities south of BCR railway.	• Flat to rolling terrain well suited to this activity. • Highly accessible; many lakes of interest. • Primarily day use. • Area is heavily used for recreation. • Tie into local accommodations. • May conflict with non-motorized use such as nordic skiing • Use of snowmobile as mode of	• Nordic skiing • Lodges/resorts • Family packages	• Investigate circuit tour development that could be marketed to the regional snowmobile market. • Link with activities and events organized through local snowmobile clubs. • Ensure future road access before promoting or packaging services. • Establish Fort St. James as a snowmobile staging area for the region. • Increase accommodation, services and amenities targeted at snowmobilers to encourage more visitation and length-of-stay.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
		access to destination activity such as ice fishing. • There has been little market or product development		
Salmon, Tsilcoh	• Husdon Bay Bridge Heritage Trail (multi-day) • Salmon Lake: day use area	• Heritage linkages – historic travel routes. • Could be developed as a multi-day loop tour with the Prince George FD. • Much recreational use.	• Hut systems • Other winter activities • Heritage	• Locate and develop trails, starting with heritage trail. Establish hut network, approx. 1 days travel apart. • Explore linkages to Prince George District. • Tie hut / trail development to summer activities to maximize return on capital and minimize conflicts with resource sectors. • Promote product development and potential locations to operators/ entrepreneurs.
Grassham, Sowchea / Cunningham, Stuart / Trembleur	• Day use from existing trail network / FS sites	• Variety of terrain from lakes (Grassham, Camsell, McNab, Marie, Nanna) to Mountains (Shass, Bud, Nielsp). • Also good potential for nordic activities. • Can be based in FSJ or from a facility in the RMZ.	• Hut systems • Lodges/resorts • Other winter activities	• Promote tourism usage. (Increase regional presence). • Maintain trails. Establish support facilities. • Maintain viewpoints and work to minimize conflict with resource sectors. • Work with interested parties to ensure road access maintained.
Flemming, Tanizul, Stuart / Trembleur, Takla/Middle	• Trembleur L, to North Arm Stuart L. and to Butterfield Creek • Trembleur L. / Middle River • Loop tour (Stuart L,	• May not be suitable activity in protected area. Also wildlife habitat considerations. • Follows traditional heritage routes. • Can use lodge facilities as base	• Hut systems • Other winter activities • Heritage	• Determine if activity suitable use for protected area. • Locate route and establish supporting facilities (huts etc) as required. • Enter into discussions with MoE regarding wildlife concerns.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
	Tachie R, Trembleur L, North Arm Stuart L)	of operations.		• Promote as regional destination.
Yatzutzin, Inzana, Mudzenchoot, Lower Nation, Stuart / Trembleur, Kloch, Takla/Middle, Takla Lake, Mitchell, Nation	• Day use from resorts or huts • Linking routes between resorts or huts • Stuart – Trembler – Takla lakes chain. Potentially 240 km winter snowmobile route.	• Mixed terrain and vegetation. • Significant wildlife habitat / corridors. • Centered in most recreationally significant region in FSJ district. • Unique chain of frozen waterways; provincially significant opportunity. • Lodge-to-lodge opportunity. Start at south and fly-out at trip termination or visa versa. Or access route terminus via BCR. • Stuart Lake sees heavy recreational use.	• Hut systems • Lodges/resorts • Other winter activities	• Determine level of desire among area resorts/entrepreneurs for development. • Tie into established lodges to promote winter product. • Investigate circuit tour development that could be marketed to the regional snowmobile market. • Establish huts as required. • Assess potential for conflicts with non-mechanized users and resource sectors. • Careful consideration of use of frozen waterways for tourism product (liability); particularly around start and end dates. • Consider Northern Long Term Road Corridors Plan for portions covered by plan.
Hogem, Omineca	• Loop tour from Takla Landing (e.g. Driftwood FSR, Fall FSR, Old Hogem Trail, Silver Cr., and Kenny Cr.)	• Generally mixed terrain. Mixture of rugged alpine peaks and gentle slopes. • Highly scenic mountain ranges. • Could require development of facilities, fuel cashes, and huts. Opportunity serviced from Takla Landing. • High value wildlife habitat.	• Hut systems • Other winter activities • Heritage • Air activities	• Determine level of interest in community for development. • Discuss potential links with Mackenzie FD.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Driftwood	• Develop trail along Driftwood River	• Multi-day opportunity. (Lodge-to-Lodge). • Remote therefore destination activity. • Air access required to destination lodge. • Linkages to area hunting lodges/camps. • Important winter wildlife range.	• Lodges/resorts • Other winter activities • Air activities	• Determine level of interest in community among area resorts/entrepreneurs for development. • Consider Northern Long Term Road Corridors Plan.
Upper Omineca, Upper Sustut/ Thumb, Sustut, Lower Sustut, Driftwood	• Loop tour: Bulkley House, Kaza Lake, Ominicetla R., Omineca R., Connelly Range, Bear L, Driftwood R.	• Wilderness loop tour, follows historical routes and potential transportation routes. • Very remote. Air access required. • Could be based from Bear Lake or Bulkley House. • Passes "The Thumb" a 100 m volcanic plug noted as significant by Parks Canada.	• Hut systems • Other winter activities • Heritage • Air activities	• Determine level of desire among area resorts/entrepreneurs for development. • Consider Northern Long Term Road Corridors Plan.
Squingula, Sustut, Lower Sustut	• Day use from destination lodge	• Glacial features, heritage, wildlife and remoteness creates a unique opportunity when combined. • Wildlife habitat in lowlands. • Known for heavy snowfall in winter. • Fishing lodges along Sustut R. or Bear L. could provide suitable	• Hut systems • Other winter activities • Heritage • Air activities	• Determine level of desire among area resorts/entrepreneurs for development. • Consider Northern Long Term Road Corridors Plan.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
		base. • Some trail and hut development would be required.		
Upper Sustut	• Multi-day use from outside the region (Moose Valley, Johanson Valley)	• Good terrain, sparse vegetation. • Historically significant routes. • Some road access from outside region.	• Hut systems • Lodges/resorts • Other winter activities	• Determine level of desire among area resorts/entrepreneurs for development. • Enter discussions with Mackenzie District regarding linkages. • Consider Northern Long Term Road Corridor Plan.
Skeena Groundhog	• Multi-day tour along Skeena (BCR right-of way)	• Currently wilderness. • No road access. • Identified as good winter wildlife range.	• Hut systems • Other winter activities • Heritage	• Consider suitability of development of trail/hut network vs. retaining the wilderness nature of the area. • Consider Northern Long Term Road Corridors Plan. • Look into linkages with Spatsizi Plateau Wilderness Park.

5.3 Lake and River Activities

Regional Development Considerations	• Whether canoeing, kayaking or rafting, the development of the lake/river product has to be tied to some outstanding recreational feature, aesthetic appeal or valued secondary activity such as fishing or a loop tour/circuit (which are rare in BC). • Resource degradation is a concern, particularly in lakes that are not stocked or which are in remote destinations. • Resource development has the potential to compromise the short-term potential of some opportunities unless aesthetic values are maintained through good landscape management.

	• Variable water levels must be considered for some waterways. • The most reliable flow rates/levels for river kayaking are associated with Fall and Spring precipitation, which coincides with the coldest months when support by casual participants would be least likely. • Long distances to opportunities in the northern portion of the region make this a high-cost product that would necessitate new market development. • Commercial opportunities, and tenure, will likely be limited in those areas where there is already a high degree of resident usage or public infrastructure.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Stuart River, Ft. St. James	• Stuart River: Fishing packaged with interpretive heritage or other activities • Canoeing / rafting • Jet boating	• Extension to Takla – Trembleur – Stuart lake chain. • Significant recreational use and fishing pressures. • Important river for salmon migration and historic travel route.	• Heritage • Family adventure • Camping • Hunting • Wildlife viewing	• Explore linkages with Prince George FD (Nechako River to Prince George). • Determine suitability of activities with BC Parks and DFO. • Compile an opportunity fact-sheet for local entrepreneurs, outlining the many opportunities (e.g. guiding, shuttling, boat rentals) related to lake and river activities.
Salmon	• Salmon River: kayaking, canoeing (Salmon L to McLeod-Tsilcoh FSR & Leirsch crossing south) • Salmon River: fishing (primarily upper river)	• Currently low recreational usage. • Significant glacial features in upper watershed.	• Camping • Picnicking • Wildlife viewing • Landscape viewing • Hiking	• Determine if existing access points, put-ins and take-outs will allow for increased use, particularly for commercial operations. • Explore linkages with Prince George FD (Salmon R. to Fraser R.)
Salmon	• Great Beaver L and adjacent lakes (Bugle,	• Heavily used for local recreation. • Many of these lakes are stocked.	• Camping • Hunting	• Compile an opportunity fact-sheet for local entrepreneurs, outlining

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
	Teardrop, Tureen, Mossvale, Snail etc): boating, canoeing, fishing, camping and lake activities (swimming, water-skiing etc)	• Highly accessible and able to support increased usage.	• Wildlife viewing • Ice fishing • Family adventure	**the many opportunities (e.g. guiding, shuttling, boat rentals) related to lake and river activities.** • **Enhance road access, in conjunction with Prince George FD.** • Ensure facilities and access points are suitable for and encourage commercial use.
Salmon	• Salmon Lake: fishing, canoeing	• Sandy beaches found in this lake are rare in part of the district.	• Camping • Hunting • Landscape • Wildlife viewing	• **Compile an opportunity fact-sheet for local entrepreneurs, outlining the many opportunities (e.g. guiding, shuttling, boat rentals) related to lake and river activities.**
Tsilcoh	• Carrier L, Ocock L, Ocock R: boating and fishing • North Road Lakes: Kalder, Cripple, Otterson, 28 Mile, Jaw Lakes: fishing, boating	• Limited fish production (shallow lakes). • More extensive opportunities can be found nearby, however, these lakes can take some pressure away from other lakes and are suited to canoeing. • Highly accessible (along North Road).	• Camping • Hunting • Wildlife viewing • Family adventure	• **Add to opportunity fact-sheet.** • **Maintain/upgrade access along North Rd.**
Sowchea / Cunningham	• Sowchea Cr.: fishing • Marie & Nanna L.: boating • Pam Lake: Fishing	• Extensive wetlands. • Common opportunity available elsewhere in district.	• Wildlife viewing • Landscape • Trail-based recreation	• **Add to opportunity fact-sheet.** • **Ensure and maintain road access.**
Grassham	• Camsell, Grassham,	• All Class B (lakes classification),	• Trail-based	• **Ensure road access maintained.**

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
	Ogston, Tomas, Whitefish L.: fishing (rainbow trout), boating	except Tomas (Class A – regionally significant). • Grassham noted for quality fish.	recreation • Camping	• Enhance facilities for tourism use. • Add to opportunity fact-sheet.
Pinchi, Inzana, Yatzutzin	• Pinchi L., Tezzeron L.: boating and fishing • Kuzkwa River: canoeing, kayaking, rafting, fishing	• Mercury contamination at Pinchi L., therefore catch and release. As a result large fish present. • Tezzeron L. has narrow sandy beaches. • Easy access.	• Lodge/Resort • Camping • Hunting • Landscape • Wildlife viewing	• Maintain access and enhance facilities for tourism use. • Build access to put-in at head of river or at Leo Creek FSR. • Compile an opportunity fact-sheet for local entrepreneurs, outlining associated opportunities. • Package with other activities.
Yatzutzin, Pinchi, Stuart / Trembleur	• Pinchi Cr., lower Tsilcoh R,: fishing • lower Tezzeron Cr..: fishing, canoeing (from Germansen Hat FSR)	• Channel restrictions & natural hazards may restrict canoeing potential.	• Wildlife viewing • Camping • Picnicking	• Maintain access and enhance facilities for tourism use. • Add to opportunity fact-sheet.
Ft. St. James, Stuart / Trembleur, Flemming	• Stuart L., Tachie R., Trembleur L.: boating, canoeing, fishing, sailing, house boating, power boating, jet boating (river)	• Sandy beaches – best in north. • Goal 2 protected area sites. • Route of longest salmon migration in BC. • Lakes of provincial significance with visually attractive shoreline. • Slopes and shoreline contributes recreation experience (visual landscape). • High levels of recreational use.	• Lodge/Resort • Camping • Beach activities • Trail-based recreation • Hunting • Landscape • Wildlife viewing	• Establish a series of mooring buoys or save havens • Ensure facilities and access points are suitable for and encourage commercial use. • Compile an opportunity fact-sheet for local entrepreneurs, outlining the many opportunities (e.g. guiding, shuttling, canoe rentals) related to opportunity. • Develop a coordinated development

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
		• Subject to sudden high winds and rough water.		and marketing plan for the lake and associated features (historic, natural). The plan should include coordinating road signage, developing an Internet site and improving access to maps and information.
Tanizul	• Tarnezell L.: fishing, boating	• Good access. • Surrounded by interesting landscapes.	• Camping • Trail-based recreation • Landscape	• Ensure road access maintained. • Add to opportunity fact-sheet.
Sowchea / Cunningham, Flemming	• Cunningham L, Nancut Cr.: fishing • Butterfield L and Cr.	• Lack of launch sites for boats (walk from road). • Cunningham L: Trophy fisheries for Rainbow Trout, Lake Trout, Dolly Varden and Mountain Whitefish.	• Camping • Trail-based recreation • Wildlife viewing • Landscape • Heritage	• Consider options for boat launch vs. retaining natural amenities. • Add to opportunity fact-sheet.
Flemming, Tanizul	• Rubyrock L, Starret L, McKelvey L.: fishing	• Walk (from nearby lodge) or fly-in access only. • Resource degradation is a concern, particularly in lakes that are not stocked or which are in remote destinations.	• Trail-based recreation • Air activities	• Discuss access considerations with BC Parks. • If suited to commercial tourism use, add to opportunity fact-sheet.
Takla Lake, Takla / Middle	• Takla L and Middle R.: boating, canoeing, fishing, sailing, house boating, power boating, jet boating	• Goal 2 protected area sites. • Route of longest salmon migration in BC. • Lakes of provincial significance with visually attractive shoreline.	• Lodge/Resort • Camping • Trail-based recreation • Hunting	• Establish a series of mooring buoys or save havens. • Ensure facilities and access points are suitable for and encourage commercial use.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
		• Slopes and shoreline contributes recreation experience (visual landscape). • High levels of recreational use. • Subject to sudden high winds and rough water.	• Landscape • Wildlife viewing	• Discuss with BCR potential to use rail lines to transport tourists to/from end of lake (destination). • **Compile an opportunity fact-sheet for local entrepreneurs, outlining the many opportunities (e.g. guiding, shuttling, canoe rentals) related to opportunity.** • Develop a coordinated development and marketing plan for the lake and associated features (historic, natural).
Takla Lake, Takla / Middle	• Tributary creeks to Middle River and Takla Lake: fishing (esp. Sakeniche R., Dust Cr.)	• Generally accessible from roads (with short hikes).	• Landscape • Wildlife viewing	• Consider implications of Northern Long Term Road Corridor plan. • Maintain access levels. • Add to opportunity fact-sheet.
Kloch	• Kazchek L. Green: fishing, boating • Kloch, Takatoot, Elliot, Purvis Lakes: fishing, boating, fishing, canoeing • Kazchek Cr.: fishing • Dan Miner, Natazutlo, Eye, Dia, Airline, Albert Lakes: canoeing, fishing (walk or fly-in access)	• Smaller lakes, all sig. for boating. • Kazchek Creek has waterfall. • Kazchek L. is most significant, with a high degree of access via Leo Cr. FSR and a beach on south end. • Resource degradation is a concern, particularly in lakes that are not stocked or which are in remote destinations.	• Camping • Trail-based recreation • Wildlife viewing	• **Enhance facilities at Kazchek L.** • **Ensure road access maintained where appropriate.** • Add to opportunity fact-sheet.
Inzana	• Inzana L.: fishing, boating • Hatdudatehl L: fishing,	• Inzana noted for trophy Char and beaches. • Hatdudatehl is a Class A lake (lakes	• Camping • Landscape	• **Promote usage of lakes (noting sensitivity of healing lodge on Dem) through opportunity fact-**

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
	boating, canoeing • Dolphin, Dem, Hat Lakes: fishing, boating	classification). • Dem has a First Nations Healing Lodge. • Resource degradation is a concern, particularly Hatdudatehl L.	• Wildlife viewing	sheet. • **Ensure road access maintained.** • **Monitor for resource degradation.**
Lower Nation	• Witch L: fishing, boating	• Walk or fly in use only. Reports of rough jeep road. • Class B lake (lakes classification). • Resource degradation is a concern.	• Camping • Wildlife viewing • Air activities	• **Maintain as fly-in/hike-in access and monitor use levels.** • **Add to opportunity fact-sheet.**
Nation, Lower Nation	• Tsayta, Indata, Tchentlo, Chuchi Lakes and Nation R.: fishing, boating, canoeing	• Potential hazards due to remoteness and severe weather conditions. • Seasonal dependencies/variances related to weather and water flow could hamper potential. • Lacking signage to access points. • International market demands natural appearing landscape. Resource extraction of the surrounding landscape should be undertaken with an eye to visuals. • Class A lakes (lakes classification). • Trophy class fishing. • Some exiting tourism lodges and several FS sites. • Several Goal 2 protected areas.	• Camping • Lodge/Resort • Hunting • Wildlife viewing	• Work with BC Parks to ensure access and facilities in northern lakes. • Ensure facilities and access points are suitable for and encourage commercial use. • Establish chain of huts for tourist / emergency use. (hut-to-hut canoeing). • Develop a coordinated development and marketing plan for the Nation Lakes Chain. The plan should include coordinating road signage, developing an Internet site and improving access to maps and information at FSJ. • Consider fly-in/fly-out options. • **Compile an opportunity fact-sheet for local entrepreneurs, outlining the many opportunities (e.g.**

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
				guiding, shuttling, canoe rentals) related to lake and river activities.
Lower Nation	• Nation River (from Chuchi L): jet boating, rafting, canoeing, kayaking	• Good access. • Private cabins, lodge at Chuchi L, near mouth of Nation R.	• Camping • Wildlife viewing	• Coordinate with McKenzie FD. • Ensure access to staging areas. • Develop facilities at staging areas.
Hogem	• Klawli River: fishing, kayaking • Kwanika Cr., Silver Cr.: fishing (road access)	• No road access; poss. Fly-in to Klawli Lake (outside district), a Class A lake. • Interesting geomorphological formations around Klawli R.	• Air activities • Landscape	• Coordinate with McKenzie FD. • Determine feasibility for wilderness kayaking. • Consider implications of Northern Long Term Road Corridor plan. • Add to opportunity fact-sheet.
Hogem	• Ahdatay L., Wudsi L: fishing, boating, canoeing	• Fly-in only.	• Air activities • Wildlife viewing • Camping	• Consider implications of Northern Long Term Road Corridor plan. • Add to opportunity fact-sheet.
Hogem	• Humphrey, Tom, Fable, Byrnes, Silver Lakes & Kenny Cr.: canoeing, boating, fishing	• Isolated but rough road access. • One outfitter in area. • Opportunity associated with "chain of lakes."	• Family adventure • Camping	• Explore possibility of adding facilities for tourists/public (FS boat launch etc). • Upgrade road access. • Consider implications of Northern Long Term Road Corridor plan. • Promote in conjunction with local operator. Add to opportunity fact-sheet.
Hogem	• Diver, Akus and Kelly L: boating • Beaverpond L.	• Repeatable with better access in south of district. • No road access for Beaverpond.	• Family adventure • Camping	• Add to opportunity fact-sheet. • Consider implications of Northern Long Term Road Corridor plan.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Hogem, Omineca, Upper Omineca	• Omineca River: Rafting, canoeing, boating, jet boating, fishing	• Opportunities continue through to Williston Lake. • Road access ends at Ominicetla Cr. Boats can travel upstream to Carruthers Creek. • Fly-in access restricted by dearth of large lakes. Helicopter access poss. • Long distances to opportunities make this a high-cost product that would necessitate new market development. • Surrounding visuals would be important to rafting clientele.	• Wildlife viewing • Heritage • Camping	• Explore linkages with Mackenzie FD. • Propose joint venture with established raft company. • Develop a coordinated development and marketing plan. • Manage landscape for visuals. • Develop facilities as required (staging areas, campsites). • Consider implications of Northern Long Term Road Corridor plan.
Upper Omineca, Driftwood	• Kaza Lake, Lion Creek: fishing, boating	• Road access from head of Takla L. • Could fly-in to Kaza L. • Distance from population has limited use of these features.	• Trail activities • Camping • Air activities • Wildlife viewing	• Consider options for transporting tourists to opportunity (drive, fly, and rail). • Consider implications of Northern Long Term Road Corridor plan. • Add to opportunity fact-sheet for local entrepreneurs.
Driftwood	• Driftwood River: Rafting, jet boating, kayaking, canoeing, fishing	• Almost 90 km stretch of navigable river (from Tetana Lake). • Limited camping areas. • Important wildlife habitat. • Access is limiting factor. • The Driftwood has a high degree of recognizability through books and magazines.	• Wildlife viewing • Hunting • Camping • Lodge/resort • Heritage	• Consider implications of Northern Long Term Road Corridor plan. • Continue promotion of opportunity. • Develop facilities as required. • Manage landscape for visuals. • Add to opportunity fact-sheet for local entrepreneurs.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Bait	• Frypan Cr., Ankwill Cr.: fishing	• Canyons and rapids. • Limited access.	• Landscape • Wildlife viewing • Camping	• Consider implication of Northern Long Term Road Corridor plan. • Add to opportunity fact-sheet.
Driftwood, Bait, Squingula	• Kotsine River, Condit Cr.: fishing	• Waterfall and significant visual features. • No road access and no large lakes for fly-in access limits potential for development.	• Landscape	• Add to opportunity fact-sheet for local entrepreneurs if road access developed. • Consider implications of Northern Long Term Road Corridor plan.
Sustut	• Bear Lake, Azuklotz Lake: fishing, boating, canoeing, jet boating	• Class A lake (lakes classification). • Noted for wild sockeye, (plus Coho, pink, Chinook, bull trout and lake trout). • Only access via air or rail. • Surrounded by attractive mountain scenery.	• Lodge/resort • Camping • Heritage • Trail based activities	• Promote as wilderness retreat with exceptional wild fishery and significant First Nations and heritage values. • Consider implications of Northern Long Term Road Corridor plan.
Sustut, Squingula	• Motase Lake, Drift Lake: fishing, boating • Squingula River: fishing, kayaking	• Motase is Class B (lakes classification) and supports salmon species. • Surrounded by interesting landscapes. • Fly-in only.	• Camping • Wildlife viewing	• Promote as fly-in retreat. • Consider implications of Northern Long Term Road Corridor plan. • Work with local tourism operators.
Canyon Lake, Sustut, Skeena, Groundhog	• Skeena River: rafting, kayaking, fishing	• One commercial operator already offers rafting trips. • Chinook, Coho, Sockeye, Pink salmon; Rainbow trout, Dolly Varden, Mountain Whitefish, Steelhead.	• Camping • Lodge/resort • Wildlife viewing • Heritage	• Determine suitability of use with DFO. • Explore linkages downstream with Kispiox FD. • Consider implications of Northern Long Term Road Corridor plan.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
				• Develop a coordinated development and marketing plan. Build on wide-spread renown, promoting headwaters aspect.
Sustut, Damdochax	• Slamgeesh R.,: fishing • Canyon L.: fishing, boating	• Remote access.	• Landscape • Heritage • Wildlife viewing	• Consider implications of Northern Long Term Road Corridor plan. Difficult access may preclude development.
Lower Sustut, Skeena, Upper Sustut, Upper Sustut/ Thumb	• Sustut River, Bear River: fishing, canoeing, kayaking, rafting	• Bear/Sustut is major corridor in region. • Sockeye, Chinook, Steelhead, Mountain Whitefish & Rainbow Trout. • Considered underutilized, but resource degradation is a concern. • Air access only. • Long distances to opportunities make this a high-cost product that would necessitate new market development. • Best access through Kispiox FD.	• Lodge/Resort • Camping • Trail based activities • Wildlife viewing • Heritage	• Work with existing lodge operators and Kispiox FD to increase usage and develop a coordinated development and marketing plan. • Determine suitability of use with DFO. • Consider implications of Northern Long Term Road Corridor plan.
Upper Sustut, Upper Sustut/ Thumb	• Sustut Lake, Johanson Lake: fishing, boating • Astika River: fishing	• Resource degradation is a concern as lakes provides critical overwintering habitat for steelhead. • Only access is fly-in to Sustut Lake or via roads in Mackenzie FD. • Both Class A lakes (lakes classification).	• Camping • Trail based activities • Wildlife viewing • Heritage	• Work with Mackenzie FD regarding access. • Consider implications of Northern Long Term Road Corridor plan. • Promote as world-class wilderness activity. • Tie into other opportunities nearby (e.g. lodge based etc).

5.4 Lake and River Activities (loop tours)

Regional Development Considerations	• The new Goal 2 protected areas can be highlighted as a key component of a "Marine Trail" network. • Ensure facilities and access points are suitable for and encourage commercial use. • **An opportunity fact-sheet, outlining the many opportunities (e.g. guiding, shuttling, canoe rentals) related to lake and river activities would help promote awareness of the potential of lake and river loops tours.** • A coordinated development and marketing plan for the Nation Lakes Chain and the Stuart / Tachie / Trembleur / Middle / Takla route. The plan should include coordinating road signage, developing an Internet site and improving access to maps and information at the local and regional Tourism Information Centres.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
	See Lake and River Activities (above) for description of loop tour opportunities.			

Petroglyph

Photo from www.princegeorge.com/tourism/fortstjames

5.5 Wildlife/Nature/Heritage/Cultural Viewing

Regional Development Considerations	• Declining salmon stocks are directly affecting viewing opportunities (e.g. viewing of salmon spawning) and indirectly (e.g. collapse of some stocks has altered bear viewing opportunities). • Conflicts between hunting and viewing are becoming more evident. Even in the Fort St. James District, where tourism is fuelled primarily by guide-outfitters focused on hunting, the price/value relationship of wildlife viewing will be negatively affected if this conflict continues. • Shifting populations and the transient nature of some species creates unpredictability in viewing and increases business risk. Encourage the development of contingency planning by operators to ensure visitors will have the opportunity to view some wildlife, if not the target species. • Access and reliability of viewing are key components to the successful development of this product. • Commercial development will depend on high levels of interpretation and linkages to associated programming. Determine level of interest among forest companies for further assisting with interpretation. • **Key aspects of the region are the unique FN culture, heritage, and Pacific/Arctic divide. Interpretation and marketing of these aspects essential.** • Participation by First Nations in the development and delivery of aboriginal cultural interpretation is essential. Steps must continue to be taken to encourage more joint ventures and business partnerships. A joint planning session with First Nations to explore opportunities for product development may be useful.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Stuart River, Ft. St. James	• Stuart River	• Extension to Takla – Trembleur – Stuart lake chain. • Significant recreational use. • Historic travel route. • Important river for salmon migration and historic travel route.	• Family adventure • Camping • Trail based activities • River activities	• Explore linkages with Prince George FD (Nechako River to Prince George). • Determine suitability of activities with BC Parks and DFO. • Compile an opportunity fact-sheet for local entrepreneurs, outlining the

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
				many opportunities (e.g. guiding, shuttling, boat rentals) related to viewing activities.
Ft. St. James	• In an around community	• National Historic Park increased profile of area. • Sowchea Bay Prov. Park – one of best sand beaches in North. • Historic trade routes and aboriginal routes. • Mt. Pope trail and viewpoint.	• Lodge/Resort • Family adventure • Camping • Trail based activities	• Develop day excursions highlighting area history (via air, boat, vehicle, horse etc.). Mode of access enhances interpretation. • Tours associated with National Historic Park. • Enhance opportunities (signage, trails, interpretation) associated with Mt. Pope.
Necoslie	• Necoslie River	• Muddy water. Low flow levels in summer.	• Trail based activities	• Add to opportunity fact-sheet.
Salmon	• Lower Salmon River, south end Great Bear Lake, Tureen, Teardrop and Boot Lakes	• Heavily used for local recreation. • Extensive glacial features and wetlands.	• Camping • Picnicking • Hiking • Lake and river activities	• **Compile an opportunity fact-sheet for local entrepreneurs, outlining the many opportunities (e.g. guiding, shuttling, boat rentals) related to viewing activities.** • **Ensure facilities and access points are suitable for and encourage commercial use.** • **Explore linkages with Prince George FD (Salmon R. to Fraser R.).**
Salmon	• Salmon Lake, Upper Salmon River, Upper Hudson Bay Brigade	• Sandy beaches found in this lake are rare in part of the district.	• Camping • Hunting	• **Develop interpretive information on heritage trail available to guided**

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
	Trail	• Extensive eskers complex and glacial features. • Aboriginal travel route and historic trade route. • Extensive trapping in area.	• Lake and river activities • Trail based activities	and self-guided visitors. • Improve signage. • Compile an opportunity fact-sheet for local entrepreneurs, outlining the many opportunities (e.g. guiding, shuttling, boat rentals) related to viewing activities.
Tsilcoh	• Carrier L, Ocock L, Ocock River • North Road Lakes: Kalder, Cripple, Otterson, 28 Mile, Jaw	• Diverse wildlife (large, small mammals and upland birds). • Esker complex south of Kalder Lake. • North Road traditional travel route. Crosses the Arctic – Pacific Divide	• Camping • Hunting • Lake and river activities • Family adventure	• Add to opportunity fact-sheet for local entrepreneurs, outlining the many opportunities (e.g. guiding, shuttling, boat rentals) related to viewing activities. • Maintain/upgrade access along North Rd. • Highlight the Arctic – Pacific Divide aspects in product delivery and marketing.
Sowchea / Cunningham	• Marie & Nanna Lakes, Sowchea Creek • Whitefish & adjacent lakes, Whitefish & Nancut Cr.	• Extensive wetlands.	• Lake and river activities • Trail-based recreation	• Add to opportunity fact-sheet. • Ensure road access maintained.
Grassham	• Camsell, Grassham, Ogston Lakes	• Shass Mountain viewpoint. • Close approximation of 3 lakes enhances opportunities. • Extensive wetlands.	• Trail-based recreation • Camping • Hunting	• Ensure road access maintained. • Enhance facilities for tourism use. • Add to opportunity fact-sheet.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
			• Lake and river activities	
Stuart / Trembleur, Yatzutzin, Pinchi, Inzana	• Pinchi Cr., lower Tsilcoh River, lower Tezzeron Cr. • Kuzkwa River • Small lakes north of Tezzeron.	• Waterfalls on Tsilcoh R. • Extensive wetlands and shallow lakes. • Lowlands around Kuzkwa R. provide excellent viewing.	• Lodge/Resort • Hunting • Camping • Picnicking • Lake and river activities	• **Maintain access and enhance facilities for tourism use.** • **Compile an opportunity fact-sheet for local entrepreneurs, outlining associated opportunities.** • **Package with other activities.**
Ft. St. James, Stuart / Trembleur, Flemming, Tanizul	• Stuart Lake (esp. Pope Mtn to Pinchi Cr.) • Tachie River • Trembleur Lake • Most notably at river/lake interface	• Sandy beaches – best in north, Indian pictographs, caves, and heritage trails. • Goal 2 protected area sites. • Route of longest salmon migration in BC. • Lakes of provincial significance with visually attractive shoreline. • Slopes and shoreline contributes recreation experience (visual landscape). • High levels of recreational use. • Heritage trade and travel route	• Lodge/Resort • Camping • Beach activities • Trail-based recreation • Hunting • Lake and river activities	• Ensure facilities and access points are suitable for and encourage commercial use. • **Develop interpretive material for heritage aspects.** • **Extensively market significance of lake and associated features (historic, natural).**
Flemming, Tanizul	• Butterfield Creek, Nancut Creek, Rubyrock Lake • North Arm Stuart Lake	• Walk (from nearby lodge) or fly-in access only. • Heritage trail / portage trail linking Stuart Trembleur and Cunningham Lakes. • Salmon spawning viewing – Nancut	• Trail-based recreation • Air activities • Lake and river activities	• Discuss access and interpretation considerations with BC Parks.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
		& Butterfield Creeks. • Mule deer found North of Cunningham L & moose North and West of Rubyrock L.		
Takla / Middle	• Mt. Sidney Williams, Tsitsutl Mountain • Northwest Arm, Sakeniche River, Dust Creek and other Takla tributaries.	• Mountain goat, caribou, moose, mule deer, grizzly, black bear, small mammals, and upland birds. • Salmon run. • Limited access via Leo-Middle and Leo-Sakeniche FSR.	• Hunting • Camping • Air activities • Lake and river activities	• Consider implication of Northern Long Term Road Corridor plan. • Add to opportunity fact-sheet.
Takla Lake, Takla / Middle	• Takla Lake and Middle River • Takla Landing • Heritage trails	• Goal 2 protected area sites. • Route of longest salmon migration in BC. • Lakes of provincial significance with visually attractive shoreline. • Slopes and shoreline contributes recreation experience (visual landscape). • High levels of recreational use. • Significant waterfowl viewing along river.	• Lodge/Resort • Camping • Trail-based recreation • Hunting • Lake and river activities	• Ensure facilities and access points are suitable for and encourage commercial use. • Develop interpretive material for heritage aspects. Promote/exhibit First Nation Culture at Takla Landing. • Extensively market significance of lake and associated features (historic, natural). • Discuss with BCR potential to use rail lines to transport tourists to/from end of lake (destination)
Kloch	• Kazchek Creek • Kazchek, Kloch, Takatoot, Elliot, Airline, Purvis Lakes • Brule Creek, Albert Lake	• Salmon viewing, rapids and waterfall on Kazchek Creek. • Kazchek L. is most significant, with a high degree of access via Leo Cr. FSR and a beach on south end.	• Camping • Trail-based recreation • Lake and river activities	• Enhance facilities at Kazchek L. • Ensure road access maintained where appropriate. • Add to opportunity fact-sheet.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
	• Green Lake	• Green lake is noted for green colouring		
Inzana, Mudzenchoot	• Inzana, Hatdudatehl and Mudzenchoot • Suchona & Wittsichica Creeks	• Region noted for diverse wildlife, including moose, mule deer, black bear, small fur-bearers, upland birds and waterfowl. • Dispersed wildlife in upland.	• Camping • Lake and river activities • Air activities	• Ensure road access maintained. • Monitor for resource degradation and habitat disturbance. • Consider upland viewing via air.
Lower Nation	• Nation River (south), Witch Lake	• Numerous wetlands. • Omineca Gold Rush trail (heritage). • Goal 2 protected areas.	• Lodge/resort • Camping • Lake and river activities • Trail based activities	• Ensure access to staging areas. • Package with other activities. • Add to opportunity fact-sheet. • Develop interpretive information / signage for area.
Nation, Lower Nation	• Tsayta, Indata, Tchentlo, Chuchi Lakes and Nation River	• Some exiting tourism lodges and several FS sites. • Wildlife viewing as component of experience paddling the Nation Lakes Canoe Chain. • Hot (warm) springs on Tchentlo Lake. • Beaches scattered throughout. • Goal 2 protected areas in Lower Nation.	• Camping • Lodge/Resort • Hunting • Lake and river activities	• Work with BC Parks to ensure access and facilities in northern lakes. • Ensure facilities and access points are suitable for and encourage commercial use. • Promote in conjunction with wilderness paddling experience.
Mitchell	• Mitchell Range	• Caribou, mountain goat, mule deer and bear. • Very rugged. Scenic mountain peaks and interesting geological formations.	• Camping • Hunting • Hiking	• Difficult access. • Consider implications of Northern Long Term Road Corridor plan. • Consider establishing air only access

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
			• Air activities	zones. • Add to opportunity fact-sheet.
Blanchet	• Takla Range	• Peaks, goat, caribou, moose, bear	• Air activities • Mountaineering	• Retain as hike or fly-in access only. • Add to opportunity fact-sheet.
Hogem	• Klawli River, Valleau Creek, Wudtsi Lake • Kwanika Cr., W. Kwanika Cr., Twin Cr., Groundhog Cr., Nation River (west of Tsayta Lake) • Kwanika Range • Takla Landing and surrounding area	• Access to northern areas on Fall-Tsayta FSR; poss. Fly-in to Klawli Lake (outside district). Access to Kwanika Range on Tchentlo FSR. • Interesting geomorphological formations around Klawli R. • Broad valley in Kwanika Creek and area has diversity of wildlife.	• Air activities • Lake and river activities • Hiking	• Maintain level of access. • Coordinate access with McKenzie FD. • Add to opportunity fact-sheet. • Develop and exhibit FN culture at Takla Landing. Tie into tours of surrounding landscape. • Consider implications of Northern Long Term Road Corridor plan.
Hogem	• Silver Creek; Humphrey, Tom, Fable, Byrnes, Silver Lakes & Kenny Cr. • Fall River, Diver, Akus and Kelly Lakes; Beaverpond Lakes. • Omincetla Creek • Pacific/Arctic drainage divide	• Isolated but rough road access. • Viewing opportunity associated with "chain of lakes" paddling. • Heritage routes, and mining remains. • Minerals (e.g. Mt Ogden jade).	• Family adventure • Camping • Lake and river activities	• **Develop interpretive material for heritage aspects.** • Upgrade road access. Consider implications of Northern Long Term Road Corridor plan. • Add to opportunity fact-sheet.
Hogem, Omineca, Upper Omineca	• Omineca River	• Viewing and heritage opportunities associated with river travel. • Road access ends at Ominicetla Cr. Boats can travel upstream to	• Lake and river activities • Camping • Hiking	• Explore linkages with Mackenzie FD. • Link viewing and heritage with activities such as rafting. • Develop facilities as required (staging

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
		Carruthers Creek. • Fly-in access restricted by dearth of large lakes. Helicopter access poss.		areas, campsites). • Consider implications of Northern Long Term Road Corridor plan.
Upper Omineca	• Kaza Lake, Lion Creek, Nanitsch Lake, Kettle Glaciers, Genlyd Creek • Axelgold Range • Cariboo Heart Range	• Road access from head of Takla L. • Could fly-in to Kaza L. • Distance from population limits use of these features. • Caribou and mountain goat.	• Trail activities • Camping • Air activities • Lake and river activities	• Consider options for transporting tourists to opportunity (drive, fly, and rail). • Consider implications of Northern Long Term Road Corridor plan. • Add to opportunity fact-sheet for local entrepreneurs.
Bait	• Frypan Cr., Ankwill Cr. • Red Bluff, White Bluff, Conglomerate Bluff • Bait Range	• Canyons, rapids and fish run. • Historic east-west travel routes. • Limited access. • Mountain goat, caribou.	• Landscape • Lake and river activities • Camping	• Consider implication of Northern Long Term Road Corridor plan. • Develop interpretive fact-sheet for bluffs. • Add to opportunity fact-sheet.
Driftwood, Squingula, Bait	• Driftwood River • Kotsine River, Condit Cr., Tsaytut Spur (Peteyaz Peak)	• Winter range for moose and mule deer. • Salmon spawning. • Access is limiting factor. • Significant heritage in area (traditional routes). • Kotsine falls among most significant in district. • The Driftwood has a high degree of recognizability through books and magazines.	• Lake and river activities • Hunting • Camping • Lodge/resort • Trail based activities • Air activities	• Consider implication of Northern Long Term Road Corridor plan. • Consider promotion of access via BCR. • Develop facilities as required. • Manage landscape for visuals. • Add to opportunity fact-sheet for local entrepreneurs.
Sustut,	• Squingula River	• Surrounded by interesting	• Camping	• Consider implications of Northern

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Squingula		landscapes. • Fly-in access only.	• Lake and river activities	Long Term Road Corridor plan. • Promote as fly-in retreat. • Work with local tourism operators.
Canyon Lake	• Canyon Lake/river	• Rapids, chutes and mountainous terrain.	• Lake and river activities	• Consider implications of Northern Long Term Road Corridor plan. • Add to opportunity fact-sheet.
Damdochax, Sustut, Skeena	• Slamgeesh River	• Access corridor to Skeena Mountains. • Broad valley, high wildlife diversity. • Mountain features in area.	• Lake and river activities	• Consider implications of Northern Long Term Road Corridor plan. • Add to opportunity fact-sheet.
Groundhog	• Kluatantan River, Tantan Creek, Tzahny Creek, Duti River (circuit) • Upper Kluatantan River • Duti headwaters	• Nearby airfield • Heritage routes in area. • Lowland wildlife migration route. • Important caribou habitat. • Dramatic mountain scenery.	• Trail based activities • Air activities	• Consider implications of Northern Long Term Road Corridor plan. • Develop interpretive information for heritage and wildlife opportunities.
Canyon Lake, Sustut, Skeena, Groundhog	• Skeena River	• Skeena is major wildlife corridor – Moose and caribou. • Heritage travel route. Jackson flats is a major junction.	• Camping • Lodge/resort • Lake and river activities	• Consider implications of Northern Long Term Road Corridor plan. • Explore linkages downstream with Kispiox FD. Tie into rafting and river products. • Develop interpretive information for heritage and wildlife opportunities. • Build on wide-spread renown, promoting headwaters aspect.
Lower Sustut,	• Sustut River, Bear River, Birdflat Creek:	• Moose and caribou wintering grounds.	• Lodge/Resort	• Consider implications of Northern Long Term Road Corridor plan.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Sustut, Upper Sustut, Upper Sustut/ Thumb		• Salmon spawning. • Air or rail access only. • Heritage travel route. Historic site of Fort Connelly. • Long distances to opportunities make this a high-cost product that would necessitate new market development. • Best access through Kispiox FD.	• Camping • Trail based activities • Lake and river activities	• Develop interpretive information for heritage and wildlife opportunities. • Work with existing lodge operators and Kispiox FD to increase usage.
Upper Sustut, Upper Sustut/ Thumb	• Sustut Lake, Johanson Lake, Johanson Creek, Solo Creek • Astika River, Willow River, Two Lake Creek • Sustut Peak, Osilinka Ranges	• Only access is fly-in to Sustut Lake or via roads in Mackenzie FD. • Significant heritage routes. • Important moose and caribou habitat.	• Camping • Trail based activities • Lake and river activities	• Consider implications of Northern Long Term Road Corridor plan. • Work with Mackenzie FD regarding access. • Develop interpretive information for heritage and wildlife opportunities. • Tie into other activities.

5.6 Mountain Bike Touring

Regional Development Considerations	• **There is very little multi-day, backcountry commercial bike touring in Canada. Most activity is single-day programming.** • **The region does not have the slickrock (i.e. high traction, steep rock) opportunities that has spurred development in parts of the US West (e.g. Moab, Utah).** • Purpose-built biking trails (gnarly trails with obstacles) will attract extreme enthusiasts. Alternately, family-oriented trails will encourage extended stays and increased spending in the area. Lop circuits will allow for multi-day opportunities. • Apine and sub-alpine mountain biking (with helicopter access) is gaining popularity in the south and may be appropriate in the

	region. • The resort or community where bike tours start and terminate is usually established where the greatest amenities are available. • Operators require campgrounds and a range of accommodation facilities for their multi-day trips. • Much of the charm in the region is it's remote nature, the best opportunities centre around multi-day excursions, tying in touring with cultural, historical or nature interpretation and wildlife viewing. • Guides and maps outlining suitable areas, distributed to potential visitors or touring companies, would help to promote the activity.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Stuart River, Ft. St. James	• Stuart River	• Significant river recreational use. • Historic travel route. • Important river for salmon migration and historic travel route.	• Family adventure • Camping • Trail based activities • River activities • Wildlife viewing • Heritage	• Explore linkages with Prince George FD (Nechako River to Prince George). • Determine suitability of activities with BC Parks and DFO. • Compile an opportunity fact-sheet for local entrepreneurs, outlining the many opportunities (e.g. guiding, shuttling, rentals).
Necoslie	• Necoslie River	• Muddy water. Low flow levels in summer.	• Trail based activities • Picnicking	• Add to opportunity fact-sheet.
Ft. St. James	• In an around community • Murray Ridge	• National Historic Park increases profile of area. • Mt. Pope trail and viewpoint.	• Lodge/Resort • Family adventure • Camping • Trail based activities	• Develop trails suitable for day excursions (technical and touring). • Enhance opportunities through signage, trails, and interpretation.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
			• Heritage	
Salmon	• Lower Salmon River, south end Great Bear Lake, Tureen, Teardrop and Boot Lakes	• Heavily used for local recreation. • Extensive glacial features and wetlands.	• Camping • Picnicking • Hiking • Lake and river activities • Wildlife viewing	• Compile an opportunity fact-sheet for local entrepreneurs, outlining the many opportunities (e.g. guiding, shuttling, rentals). • Ensure facilities and access points are suitable for and encourage commercial use. • Explore linkages with Prince George FD (Salmon R. to Fraser R.).
Salmon	• Salmon Lake, Upper Salmon River, Upper Hudson Bay Brigade Trail	• Sandy beaches found in this lake are rare in part of the district. • Extensive eskers complex and glacial features. • Aboriginal travel route and historic trade route. • Extensive trapping in area.	• Camping • Hunting • Lake and river activities • Hiking • Wildlife viewing	• Develop interpretive information on heritage trail available to guided and self-guided visitors. • Improve signage. • Compile an opportunity fact-sheet for local entrepreneurs, outlining the many opportunities (e.g. guiding, shuttling, rentals).
Tsilcoh, Inzana	• Carrier L, Ocock L, Ocock River • Hudson Bay Brigade Trail • North Road / Lakes: Kalder, Cripple, Otterson, 28 Mile, Jaw	• Diverse wildlife (large, small mammals and upland birds). • Esker complex south of Kalder Lake. • Arctic – Pacific Divide.	• Camping • Lake and river activities • Family adventure • Hiking • Wildlife viewing	• Add to opportunity fact-sheet for local entrepreneurs, outlining the many opportunities (e.g. guiding, shuttling, rentals). • Maintain/upgrade access along North Rd. • Highlight the Arctic – Pacific

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
				Divide aspects in product delivery and marketing.
Sowchea / Cunningham	• Marie & Nanna Lakes, Sowchea Creek • Stuart Lake Pack Trail • Nancut Portage, Stuart/Cunningham Portage	• Historic travel routes. • Relatively flat touring terrain.	• Lake and river activities • Wildlife viewing	• Develop interpretive information on heritage trail. • Add to opportunity fact-sheet. • Ensure road access maintained.
Grassham	• Camsell, Grassham, Ogston Lake triangle	• Shass Mountain viewpoint. • Close approximation of 3 lakes enhances opportunities.	• Trail-based recreation • Camping • Wildlife viewing • Lake and river activities	• Ensure access maintained. • Enhance facilities for tourism use. • Add to opportunity fact-sheet.
Stuart / Trembleur, Yatzutzin, Pinchi, Inzana	• Stuart, Tezzeron, Inzana Lake shoreline • Manson Cr. Trail • Pinchi Cr., lower Tsilcoh River, lower Tezzeron Cr., Kuzkwa River • Small lakes north of Tezzeron.	• Waterfalls on Tsilcoh R. • Extensive wildlife viewing. • Close to community.	• Lodge/Resort • Wildlife Viewing • Camping • Picnicking • Lake and river activities	• Maintain access and enhance facilities for tourism use. • Compile an opportunity fact-sheet for local entrepreneurs, outlining associated opportunities. • Package with other activities.
Ft. St. James, Stuart / Trembleur, Flemming,	• River/lake interface: Stuart Lake, Tachie River, Trembleur Lake, Butterfield Creek, Starret Lake	• Numerous features (beaches, pictographs, caves, and heritage trails). • High levels of recreational use. • Heritage trade and travel route.	• Lodge/Resort • Camping • Beach activities • Trail-based	• Ensure facilities and access points are suitable for and encourage commercial use. • Develop interpretive material for heritage aspects.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Tanizul		• Based from lodges or fly-in access. • Hut development would be an asset.	recreation • Wildlife viewing • Lake and river activities	• **Additional trail development would be beneficial.** • **Discuss access and interpretation considerations with BC Parks.**
Takla Lake, Takla / Middle	• Takla Lake (SW of Northwest arm), Northwest Arm Junction and Middle River • Takla Landing • NW Arm to Omineca Trail to Takla Landing loop	• Area lodges and good road access. • Significant waterfowl viewing along river. • Heritage trails.	• Lodge/Resort • Camping • Trail-based recreation • Wildlife viewing • Lake and river activities	• Ensure facilities and access points are suitable for and encourage commercial use. • Extensively market significance of lake and associated features (historic, natural). • Discuss with BCR potential to use rail lines to transport tourists to/from end of lake (destination). • Consider implication of Northern Long Term Road Corridor plan.
Kloch	• Loop around Kazchek (lake & Cr.), Kloch, Takatoot, Elliot, Airline, Purvis Lakes • Side trip to Tchentlo L.	• Salmon viewing, rapids and waterfall on Kazchek Creek. • Kazchek L. is most significant, with a high degree of access via Leo Cr. FSR and a beach on south end.	• Camping • Trail-based recreation • Lake and river activities	• **Enhance facilities throughout (picnicking, camping).** • **Ensure road access maintained where appropriate.** • Add to opportunity fact-sheet.
Nation, Lower Nation	• Nation River / Chuchi Lake Interface (south) • Lake shoreline • Areas surrounding lodge facilities	• Numerous cottages and infrastructure. • Omineca Gold Rush trail (heritage). • Hot springs (no road or trail access, could be transported via lodge).	• Lodge/resort • Camping • Lake and river activities • Wildlife viewing	• Ensure access to staging areas. • Package with other activities. • Add to opportunity fact-sheet. • Trail development in Lower Nation would be beneficial. • Develop interpretive information /

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
				signage for area. • Work with BC Parks to determine suitability / access in Nation RMZ.
Hogem	• Klawli River, Kwanika Cr., W. Kwanika Cr., Groundhog Cr., Kwanika Range	• Interesting geomorphological formations around Klawli R. • Broad valley in Kwanika Creek and area has diversity of wildlife.	• Air activities • Lake and river activities • Hiking • Wildlife viewing	• Maintain level of access. • Add to opportunity fact-sheet. • Consider implications of Northern Long Term Road Corridor plan.
Hogem	• Loop: Takla Lake, Silver Creek; Humphrey, Tom, Fable, Byrnes, Silver Lakes & Kenny Cr., Fall River, Diver, Akus and Kelly Lakes; (Beaverpond Lakes), Takla Lake. • Omincetla Creek/Ogden Creek loop	• Isolated but rough road access. • Heritage routes, and mining remains. • Minerals (e.g. Mt Ogden jade). • Stage from Takla Landing	• Family adventure • Camping • Lake and river activities • Wildlife viewing	• **Develop interpretive material for heritage aspects.** • Consider implications of Northern Long Term Road Corridor plan. • Tie into other opportunities (rafting, hiking, and viewing). • Add to opportunity fact-sheet.
Hogem, Omineca, Upper Omineca	• Omineca River	• Road access ends at Ominicetla Cr. Boats can travel upstream to Carruthers Creek. Would require trail development.	• Lake and river activities • Camping • Wildlife viewing	• Link with activities such as rafting. • Develop facilities as required (staging areas, campsites, and trails). • Consider implications of Northern Long Term Road Corridor plan.
Upper Omineca, Driftwood	• Bulkley House to Kaza Lake, Nanitsch Lake, Kettle Glaciers, Yuen Eskers • Axelgold Range	• Road access from head of Takla L. • Could fly-in to Kaza L. • Heritage and wildlife.	• Hiking • Camping • Air activities • Lake and river activities	• Consider options for transporting tourists to opportunity (drive, fly, and rail). • Consider implications of Northern Long Term Road Corridor plan.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
	• Cariboo Heart Range		• Wildlife viewing	• Trail marking/upgrade required. • Add to opportunity fact-sheet for local entrepreneurs.
Bait	• Frypan Cr., Ankwill Cr.	• Historic east-west travel routes. • Limited access.	• Lake and river activities • Camping	• Consider implication of Northern Long Term Road Corridor plan. • Add to opportunity fact-sheet.
Driftwood, Squingula, Sustut	• Loop: Driftwood River, Kotsine River, Condit Cr., Tsaytut Spur (Peteyaz Peak), Bear Lake	• Access is limiting factor. • Significant heritage and wildlife in area (traditional routes). • Kotsine falls among most significant in district. • The Driftwood has a high degree of recognizability through books and magazines.	• Lake and river activities • Wildlife viewing • Camping • Lodge/resort • Hiking • Air activities	• Consider implication of Northern Long Term Road Corridor plan. • Consider promotion of access via BCR. • Develop facilities as required. • Manage landscape for visuals. • Add to opportunity fact-sheet for local entrepreneurs.
Sustut, Squingula	• Squingula River	• Surrounded by interesting landscapes. • Accessible from nearby lodges.	• Camping • Lake and river activities • Hiking	• Consider implications of Northern Long Term Road Corridor plan. • Work with local tourism operators.
Damdochax, Sustut, Canyon Lake	• Telegraph Trail • Slamgeesh R / Canyon Lake side trips • Skeena River	• Telegraph Trail (heritage trail) would have to be routed / flagged. • Skeena River and side trips would require major trail work. • No access over Skeena.	• Lake and river activities • Heritage	• Consider implications of Northern Long Term Road Corridor plan. • Establish and mark historic route. • Add to opportunity fact-sheet.
Groundhog	• Kluatantan River, Tantan Creek, Tzahny Creek, Duti River (circuit)	• Nearby airfield. • Heritage routes and wildlife in area. • Dramatic mountain scenery.	• Hiking • Air activities • Wildlife viewing	• Consider implications of Northern Long Term Road Corridor plan. • Develop interpretive information for

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
	• Upper Kluatantan River			opportunities.
Sustut, Skeena, Groundhog	• Skeena River (north of Sustut)	• Skeena is major wildlife corridor and heritage travel route. Jackson flats is a major junction.	• Camping • Lodge/resort • Lake and river activities • Wildlife viewing	• Consider implications of Northern Long Term Road Corridor plan. • Tie into rafting and river products. • Develop interpretive information. • Build on wide-spread renown of Skeena R.
Lower Sustut, Sustut, Upper Sustut, Upper Sustut/ Thumb	• Sustut River, Bear River, Birdflat Creek:	• Bear/Sustut is major corridor in region. • Lodges in area could support activity. • Air or rail access only. • Heritage travel route. Historic site of Fort Connelly. • Long distances to opportunities make this a high-cost product that would necessitate new market development.	• Lodge/Resort • Camping • Hiking • Lake and river activities • Wildlife viewing	• Consider implications of Northern Long Term Road Corridor plan. • Develop interpretive information. • Work with existing lodge operators and Kispiox FD to increase usage.
Upper Sustut, Upper Sustut/ Thumb	• Sustut Lake, Johanson Lake, Johanson Creek, Astika River loop (with side trips up tributaries)	• Only access is fly-in to Sustut Lake or via roads in Mackenzie FD. • Trail development required.	• Camping • Hiking • Lake and river activities • Wildlife viewing	• Consider implications of Northern Long Term Road Corridor plan. • Work with Mackenzie FD regarding access. • Develop interpretive information. • Promote as world-class wilderness activity. Tie into other opportunities nearby (e.g. lodge based etc)

5.7 Horse Packing / Trail Riding

Regional Development Considerations	• There are a large number of heritage trails suitable for this activity. • While trail development and interpretation is important, the key to building a trail riding product is related to marketing and promotion that will attract travellers into the community and onto its trails. • Tourism operators can add additional benefit through providing supporting services such as accommodation and shuttling. • A network of huts along heritage routes would provide a unique experience. • **The best potential for commercial trail riding is in conjunction with activities such as wildlife viewing, hunting and helicopter or air supported access.**

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
	Please see Mountain Biking (above) for a description of Trail Riding opportunities			

Fort St. James

Photo from www.harbour.com/parkscan/fsj/

5.8 4x4/ATV Touring

Regional Development Considerations	• ATVs are ideally suited to trails that are either too narrow or difficult for a conventional 4x4 to manage. They are also well suited for inexperienced off-road travellers because of their wide wheel base. • Commercial potential for ATV touring is better than for 4x4 because the vehicles can be more easily shuttled to difficult-to-access locations. • Disused logging and mining roads to the alpine or sub-alpine are ideal routes for 4x4 traffic. It is for this reason that the deactivation of high-value roads (value for recreation and access provided) is a major concern for this product. • There are safety concerns regarding ATV use on active roads as well as ATV use by inexperienced backroad travellers. A trail map or guide would help to promote save areas for off-road tours and could also address road safety issues, regulations and codes of behaviour. • There are concerns regarding wildlife management (poaching and noise disrupting habitat) and increased vandalism resulting from increased access to areas via ATV or 4x4 vehicles. • Care would have to be taken to separate 4x4/ATV development from other ecotourism products, especially if hiking, biking and river/lake activities are developed. • There are no designated areas for 4x4/ATV activity in the study area. Because future development potential will likely be linked to avoiding conflicts with other outdoor users, designated areas would be beneficial. The first region in British Columbia to establish and effectively market such an area will enjoy "first mover" status, and gain a competitive advantage over other regions.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Ft. St. James, Yatzutzin, Pinchi	• In an around community	• National Historic Park increases profile of area. • Easy access, high local usage. • Important access mode for other activities (fishing, boating etc).	• Lodge/Resort • Family adventure • Trail based activities • Heritage	• Enhance opportunities through signage, trails, and interpretation.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Necoslie	• Necoslie FSR and adjacent roads	• Near FSJ.	• Trail based activities • Picnicking	• Add to opportunity fact-sheet.
Salmon	• Lower Salmon River, south end Great Bear Lake, Tureen, Teardrop and Boot Lakes • Near upper Salmon River crossings	• Heavily used for local recreation. • Also transportation for other activities (boating, fishing etc).	• Camping • Picnicking • Hiking • Lake and river activities • Wildlife viewing	• **Compile an opportunity fact-sheet for local entrepreneurs, outlining the many opportunities.** • **Ensure facilities, signage and access points are suitable for and encourage commercial use.** • **Explore linkages with Prince George FD.**
Tsilcoh, Inzana	• North Road / Lakes: Kalder, Cripple, Otterson, 28 Mile, Jaw	• Links FSJ with Lower Nation Lakes • Much local use. • Important forestry road.	• Camping • Lake and river activities • Family adventure • Wildlife viewing	• **Add to opportunity fact-sheet for local entrepreneurs, outlining the many opportunities (e.g. guiding, shuttling, rentals).** • **Maintain/upgrade access along North Rd.** • **Highlight the Arctic – Pacific Divide aspects in product delivery and marketing.**
Sowchea / Cunningham	• Cunningham FSR and near major lakes	• Historic travel routes. • Relatively flat touring terrain.	• Lake and river activities • Wildlife viewing • Camping	• **Develop interpretive information on heritage.** • **Upgrade signage.** • **Add to opportunity fact-sheet.** • **Ensure road access maintained.**

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Grassham	• Camsell, Grassham, Ogston Lake triangle	• Shass Mountain viewpoint. • Close approximation of 3 lakes enhances opportunities.	• Trail-based recreation • Camping • Wildlife viewing • Lake and river activities	• Ensure access maintained. • Enhance facilities for tourism use. • Add to opportunity fact-sheet.
Stuart / Trembleur	• Lake shoreline • Tachie River	• River is major feature. • ATV use	• Lodge/Resort • Wildlife Viewing • Camping • Picnicking • Lake and river activities	• Maintain access and enhance facilities for tourism use. • Compile an opportunity fact-sheet for local entrepreneurs, outlining associated opportunities. • Package with other activities.
Inzana	• River/lake/road interface	• High levels of recreational use.	• Lodge/Resort • Camping • Trail-based recreation • Wildlife viewing • Lake and river activities	• Ensure facilities and access points are suitable for and encourage commercial use.
Takla Lake, Takla / Middle	• Takla Lake (SW of Northwest arm), and Middle River	• Good road access, but travel time from lodge/community dictates as multi-day or fly-in experience. • Heritage trails.	• Lodge/Resort • Camping • Trail-based recreation • Wildlife viewing • Lake and river	• Ensure facilities and access points are suitable for and encourage commercial use. • Extensively market significance of lake and associated features (historic, natural). • Discuss with BCR potential to use

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
			activities	rail lines to transport tourists to/from end of lake (destination). • Consider implication of Northern Long Term Road Corridor plan.
Kloch	• Loop around Kazchek (lake & Cr.), Kloch, Takatoot, Elliot, Airline, Purvis Lakes • Side trip to Tchentlo L. & hotspring (see below)	• Salmon viewing, rapids and waterfall on Kazchek Creek. • Kazchek L. is most significant, with a high degree of access via Leo Cr. FSR and a beach on south end.	• Camping • Trail-based recreation • Lake and river activities	• **Enhance facilities throughout (picnicking, camping).** • **Ensure road access maintained where appropriate.** • Add to opportunity fact-sheet.
Lower Nation, Nation	• South Chuchi Lake and North Tchentlo Lake • North Tsayta Lake	• Associated with cottages and access to other activities (boating, fishing, lake chain). • Hot springs (no road or trail access, could be transported via lodge).	• Lodge/resort • Camping • Lake and river activities • Wildlife viewing	• Ensure access to staging areas. • Package with other activities. • Add to opportunity fact-sheet. • Develop interpretive information / signage for area. • Work with BC Parks to determine suitability / access in Nation RMZ.
Hogem	• Klawli River, Kwanika Cr., W. Kwanika Cr., Groundhog Cr., Kwanika Range	• Interesting geomorphological formations around Klawli R. • Broad valley in Kwanika Creek and area has diversity of wildlife.	• Air activities • Lake and river activities • Hiking • Wildlife viewing	• Maintain level of access. • Add to opportunity fact-sheet. • Consider implications of Northern Long Term Road Corridor plan.
Hogem	• Loop: Takla Lake, Silver Creek; Humphrey, Tom, Fable, Byrnes, Silver Lakes & Kenny Cr., Fall River, Diver, Akus and	• Isolated but rough road access. • Heritage routes, and mining remains. • Minerals (e.g. Mt Ogden jade). • Stage from Takla Landing.	• Family adventure • Camping • Lake and river activities	• **Develop interpretive material for heritage aspects.** • Consider implications of Northern Long Term Road Corridor plan. • Tie into other opportunities (rafting,

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
	Kelly Lakes; (Beaverpond Lakes), Takla Lake. • Omincetla Creek/Ogden Creek loop		• Wildlife viewing	hiking, and viewing). • Add to opportunity fact-sheet.
Hogem, Omineca	• Omineca River	• Road access ends at Ominicetla Cr. Boats can travel upstream to Carruthers Creek. Would require development. • No bridge across Omineca R.	• Lake and river activities • Camping • Wildlife viewing	• Link with activities such as rafting. • Develop facilities as required (staging areas, campsites, and trails). • Consider implications of Northern Long Term Road Corridor plan.
Upper Omineca, Driftwood	• Bulkley House to Kaza Lake, Nanitsch Lake	• Access from head of Takla L. • Could fly-in to Kaza L. • Best suited to ATV. • Not suitable if horse or hiking opportunities developed.	• Hiking • Camping • Air activities • Lake and river activities • Wildlife viewing	• Consider options for transporting tourists to opportunity (drive, fly, and rail). • Consider implications of Northern Long Term Road Corridor plan. • Trail marking/upgrade required. • Add to opportunity fact-sheet for local entrepreneurs.
Bait	• Ankwill Cr.	• Limited access.	• Lake and river activities • Camping	• Consider implication of Northern Long Term Road Corridor plan. • Add to opportunity fact-sheet.
Driftwood	• Driftwood River road network	• Limited access to road network • The Driftwood has a high degree of recognizability through books and magazines.	• Lake and river activities • Wildlife viewing • Camping • Lodge/resort • Hiking	• Consider implication of Northern Long Term Road Corridor plan. • Consider promotion of access via BCR. • Develop facilities as required. • Manage landscape for visuals. • Add to opportunity fact-sheet for

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
			• Air activities	local entrepreneurs.
Sustut, Squingula	• Squingula River	• Surrounded by interesting landscapes. • Accessible from nearby lodges. • No road across Skeena / Sustut Rivers.	• Camping • Lake and river activities • Hiking	• Consider implications of Northern Long Term Road Corridor plan. • Work with local tourism operators.
Damdochax, Sustut, Canyon Lake	• Telegraph Trail	• Telegraph Trail (heritage trail) would have to be routed / flagged. • Not suitable if horse or hiking opportunities developed. • No access over Skeena.	• Lake and river activities • Heritage	• Consider implications of Northern Long Term Road Corridor plan. • Establish and mark historic route. • Add to opportunity fact-sheet.
Lower Sustut, Sustut, Skeena, Groundhog	• Skeena River (north of Sustut), Sustut River, North Bear Lake	• Skeena is major wildlife corridor and heritage travel route. Jackson flats is a major junction. • Best suited to ATV. Not suitable if horse or hiking opportunities developed. • Support of local lodges required. • Long distances to opportunities make this a high-cost product that would necessitate new market development.	• Camping • Lodge/resort • Lake and river activities • Wildlife viewing	• Consider implications of Northern Long Term Road Corridor plan. • Tie into rafting and river products. • Develop interpretive information. • Build on wide-spread renown of Skeena R.
Upper Sustut	• Johanson Lake, Johanson Creek, Solo Creek	• Only access is fly-in to Sustut Lake or via roads in Mackenzie FD. • Lack of supporting facilities in area (campsites, lodges etc).	• Camping • Hiking • Lake and river activities • Wildlife viewing	• Consider implications of Northern Long Term Road Corridor plan. • Work with Mackenzie FD regarding access. • Develop interpretive information. • Promote as world-class wilderness activity.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
				• Tie into other opportunities nearby (e.g. lodge based etc).

5.9 Destination Lodges/Resorts

Regional Development Considerations	• Uncertainty around the sport fishery in conjunction with high capital costs have created a high degree of risk establishing new lodges or upgrading the facilities of old lodges. • The visual quality of the surrounding landscape is an important issue among ecotourists and probably more important for lodge/resort visitors than other tourism sector. Lodge visitors, particularly those who have traveled significant distances, have a high expectation of encountering wilderness or naturally appearing landscapes. The inability to reinforce the "SuperNatual" notion, because timber harvesting activity is too visible, is a real and growing problem for operators. • Lodges which have access to a diversity of activities, are in close proximity to wildlife viewing areas or those who have established a market niche will have a competitive advantage in the shift to the ecotourism market. • The length of time it takes to get approval for a lease or license of occupation from the BC Assets and Land Corporation and the uncertainty associated with the process means it will be difficult to attract development unless there is some pre-assessment work done on best sites and opportunities. Lodge based operators are under pressure not only to gain tenured status for a lodge facility, but also for the activities (e.g. hiking, trail riding) they wish to offer in the surrounding area. • The trend toward a more full-service experience will favour increased packaging as well as the lodge/resort style of holiday where the visitor does not have to make a series of purchase decisions once they have arrived. This will create opportunities for tourism operators who offer activities to create close working relationships with accommodation providers to offer a full-service package. However, a lack of infrastructure / services and limited labour supply somewhat constrains development potential. • Spas and retreats that focused on the business and small convention market but with an outdoor component could be viable.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Ft. St. James, Yatzutzin, Pinchi	• Frontcountry Lodge • High-end RV facility	• National Historic Park increases profile of area. • Easy access.	• Family adventure • Trail based activities • Heritage	• Link with area activities • Enhance opportunities through signage, trails, and interpretation.
Salmon	• Lower Salmon River, south end Great Bear Lake, Tureen, Teardrop and Boot Lakes	• Heavily used for local recreation. • Many industrial roads in area. • Several FS Rec. sites in area.	• Picnicking • Hiking • Lake and river activities • Wildlife viewing	• Add to opportunity fact-sheet for local entrepreneurs, outlining the opportunities. • Ensure facilities, signage and access points are suitable for and encourage commercial use. • Explore linkages with Prince George FD.
Tsilcoh, Inzana	• North Road Lakes: Kalder, Cripple, Otterson, 28 Mile, Jaw	• Links FSJ with Lower Nation Lakes • Local recreational use. • Important forestry road.	• Lake and river activities • Family adventure • Wildlife viewing	• Add to opportunity fact-sheet for local entrepreneurs, outlining the opportunities. • Maintain/upgrade access along North Rd.
Sowchea / Cunningham	• East end Cunningham Lake • Marie/Nanna Lakes	• Many activities in area • Heritage and wildlife.	• Lake and river activities • Wildlife viewing • Trail based activities	• Develop interpretive information. • Add to opportunity fact-sheet. • Ensure road access maintained.
Grassham	• Camsell, Grassham, Ogston Lake triangle	• Close approximation of 3 lakes enhances opportunities.	• Trail-based recreation	• Ensure access maintained. • Add to opportunity fact-sheet.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
		• Lodge and FS Rec. sites in area.	• Wildlife viewing • Lake and river activities	
Stuart / Trembleur	• Stuart Lake: Stones Bay to Battleship Isl. or Beaver Island to Whitefish Bay • Middle River (esp. at Kuzkwa confluence)	• Close to FSJ, yet boat or fly in access – road access possible. • Many features and recreation activities in area. • Other suitable locations in RMZ already have facilities.	• Wildlife Viewing • Lake and river activities • Trail based activities • Family adventure	• **Maintain access for tourism use.** • **Compile an opportunity fact-sheet for local entrepreneurs, outlining associated opportunities.** • **Package with activities.**
Inzana	• Lakes in RMZ	• Generally road accessible. • Some existing facilities • Dem Lake has a First Nations Healing Lodge	• Trail-based recreation • Wildlife viewing • Lake and river activities	• Ensure facilities and access points are suitable for and encourage commercial use.
Takla Lake, Takla / Middle	• Middle River, Middle/Kazchek confluence • Sakeniche R / Takla Lake • Head NW Arm, Takla Lake	• Some road access, but fly-in or boat-in access may be more suitable. • Excellent surrounding landscape • Heritage trails.	• Trail-based recreation • Wildlife viewing • Lake and river activities	• Ensure access points are suitable for and encourage commercial use. • Extensively market significance of lake and associated features (historic, natural). • Discuss with BCR potential to use rail lines to transport tourists to/from end of lake (destination). • Consider implication of Northern Long Term Road Corridor plan.
Kloch	• Kazchek, Kloch, Takatoot, Elliot, Airline, Purvis Lakes	• Kazchek L. is most significant, with a high degree of access via Leo Cr. FSR and a beach on south end.	• Trail-based recreation • Lake and river	• **Ensure road access maintained where appropriate.** • Add to opportunity fact-sheet.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
			activities	
Lower Nation	• Nation River between Tchentlo and Chuchi Lake • Nation River south of Chuchi Lake	• Cottages on Chuchi Lake • Support Nation Lakes Canoe route or opportunities in Nation River.	• Lake and river activities • Wildlife viewing	• Ensure access. • Package with other activities. • Add to opportunity fact-sheet. • Develop interpretive information / signage for area.
Nation	• Nation River between Lakes	• Support Nation Lakes Canoe route. • Take advantage of warm springs.	• Lake and river activities • Wildlife viewing	• Work with BC Parks to determine suitability in Nation RMZ.
Hogem	• Klawli River (Lake) – outside district • Kwanika Cr., W. Kwanika Cr., Groundhog Cr. • Silver Creek; Humphrey, Tom, Fable, Byrnes, Silver Lakes & Kenny Cr., Fall River, Diver, Akus and Kelly Lakes, Beaverpond Lakes	• Interesting geomorphological formations around Klawli R. • Broad valley in Kwanika Creek and area has diversity of wildlife. • Isolated but rough road access. •	• Air activities • Lake and river activities • Hiking • Wildlife viewing • Family adventure	• Maintain level of access. • Add to opportunity fact-sheet. • Consider implications of Northern Long Term Road Corridor plan. • Discuss linkages with Mackenzie FD if developing Klawli. • Tie into supporting opportunities.
Hogem, Omineca, Upper Sustut/ Thumb	• Omineca River	• Road access ends at Ominicetla Cr. Boats can travel upstream to Carruthers Creek. Would require development. • No bridge across Omineca R. • Omineca RMZ is the most suitable, but is a protected area.	• Lake and river activities • Wildlife viewing	• Link with activities such as rafting. • Consider implications of Northern Long Term Road Corridor plan. • Discuss suitability of facility in Omineca RMZ.
Upper Omineca,	• Kaza Lake, Nanitsch	• Trail access from head of Takla L.	• Hiking	• Consider options for transporting

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Driftwood	Lake • Lion Creek	• Could fly-in to Kaza L. • Very scenic surroundings.	• Air activities • Lake and river activities • Wildlife viewing	tourists to opportunity (drive, fly, and rail). • Consider implications of Northern Long Term Road Corridor plan. • Add to opportunity fact-sheet for local entrepreneurs.
Bait	• Frypan Cr., Ankwill Cr.	• Limited access.	• Lake and river activities	• Consider implication of Northern Long Term Road Corridor plan. • Add to opportunity fact-sheet.
Driftwood	• Driftwood River	• The Driftwood has a high degree of recognizability through books and magazines. • Many supporting activities • Lodge at Bear Lake	• Lake and river activities • Wildlife viewing • Hiking • Air activities	• Consider implication of Northern Long Term Road Corridor plan. • Consider promotion of access via BCR. • Manage landscape for visuals. • Add to opportunity fact-sheet for local entrepreneurs.
Sustut, Squingula, Driftwood,	• Squingula River • Driftwood River, Kotsine River, Condit Cr., Tsaytut Spur (Peteyaz Peak),	• Surrounded by interesting landscapes. • No road across Skeena / Sustut Rivers. • Access is limiting factor. • Lodge at Bear Lake.	• Lake and river activities • Wildlife viewing • Hiking • Air activities	• Consider implications of Northern Long Term Road Corridor plan. • Consider promotion of access via BCR. • Manage landscape for visuals. • Add to opportunity fact-sheet for local entrepreneurs.
Damdochax, Sustut, Canyon Lake	• Telegraph Trail • Slamgeesh R / Canyon Lake side trips • Skeena River	• Surrounded by interesting landscapes. • Access is limiting factor.	• Lake and river activities • Heritage	• Consider implications of Northern Long Term Road Corridor plan. • Add to opportunity fact-sheet.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
Groundhog	• Kluatantan River, Tantan Creek, Tzahny Creek, Duti River (circuit) • Upper Kluatantan River	• Nearby airfield. • Heritage routes and wildlife in area. • Dramatic mountain scenery.	• Hiking • Air activities • Wildlife viewing	• Consider implications of Northern Long Term Road Corridor plan. • Develop interpretive information for opportunities.
Sustut, Skeena, Groundhog	• Skeena River (north of Sustut R.)	• Skeena is major wildlife corridor and heritage travel route. Jackson flats is a major junction.	• Camping • Lake and river activities • Wildlife viewing	• Consider implications of Northern Long Term Road Corridor plan. • Tie into rafting and river products. • Develop interpretive information. • Build on wide-spread renown of Skeena R.
Lower Sustut, Sustut, Upper Sustut, Upper Sustut/ Thumb	• Sustut River, Bear River, Birdflat Creek:	• Bear/Sustut is major corridor in region. • Already lodges in area. • Air or rail access only. • Heritage travel route. Historic site of Fort Connelly. • Long distances to opportunities make this a high-cost product that would necessitate new market development. • Best access through Kispiox FD.	• Hiking • Lake and river activities • Wildlife viewing	• Consider implications of Northern Long Term Road Corridor plan. • Develop interpretive information.
Upper Sustut, Upper Sustut/ Thumb	• Sustut Lake, Johanson Lake, Johanson Creek, Astika River	• Only access is fly-in to Sustut Lake or via roads in Mackenzie FD.	• Hiking • Lake and river activities • Wildlife viewing	• Consider implications of Northern Long Term Road Corridor plan. • Work with Mackenzie FD regarding access. • Develop interpretive information. • Promote as world-class wilderness activity.

RMZ	Opportunity	Local Development Considerations	Product Linkages	Potential Actions
				• Tie into area opportunities.

6 ISSUES AND RECOMMENDATIONS

The previous chapter focused on opportunities related to product development. This chapter deals with broader tourism and community development issues that have implications for product development. The focus is on correcting weaknesses and gaps that may impede development. Without the basic building blocks of economic development, communities will find it difficult to attract and grow the investment, entrepreneurship, labour and infrastructure need to create high value tourism.

6.1 District Tourism SWOT Analysis

As part of the work plan, efforts were made to identify the strengths, weaknesses, opportunities and threats to tourism in the Fort St. James Forest District. This information was obtained from: returned tourism operator surveys, the IGPT steering committee and the expertise of the contractors. The overall SWOT results generated for the study area are shown in Table 1. Three additional summary tables follow this table:

- Common tourism development issues and concerns are summarized in Table 2
- Common tourism development opportunities are summarized in Table 3
- The results of a tourism workshop with twelve Gitxsan Hereditary Chiefs are shown in Table 4

Immediately following the summary tables, Section 0 examines tourism development recommendations and 'next steps' that address the various tourism needs and opportunities which require attention in order to ensure that the Fort St. James tourism area moves forward in a positive and proactive manner.

Fort St. James Photo from www.roadwaves.com/media/stjmes

Table 1: Fort St. James Tourism SWOT Analysis

Tourism Strengths for the Fort St. James Forest District

- raw tourism product inventory which matches present & future tourist demands
- relatively easy access to the immediate area via: vehicle, air & motorcoach
- unique native cultural & heritage products
- present US $ exchange rate
- large amount of pristine wilderness
- clean water
- small receptive tour operator infrastructure capable of servicing tourist needs
- first-rate fishing and boat/canoe touring products
- growing awareness of Northern BC as a desired tourism destination
- abundance of wildlife for viewing
- very low density of population

Tourism Weaknesses for the Fort St. James Forest District

- overall lack of built and/or developed tourism facilities
- very limited number of tourism suppliers
- undercapitalized and under developed mix of tourism products
- the location of Fort St. James acts to discourage side-trip visitation
- lack of "circle tour" product due to one road in/out of area
- very limited promotion of area as destination
- lack of 'critical mass' of tourism operators with which to collectively market local tourism opportunities
- little or no support/leadership/direction from Provincial Government for tourism sector
- lack of awareness in marketplace of local/regional tourism opportunities
- lack of tourism development assistance for non-native entrepreneurs
- poor weather patterns

Tourism Threats for the Fort St. James Forest District

- uncertainty of land claims
- uncertainty of both Provincial and/or Federal fisheries policies
- continuation of BC recession
- poor investment climate
- too many access roads being developed
- conflicting land-use regimes
- forest harvesting techniques resulting in large openings very visible to the travelling public
- lack of Provincial government appreciation for the tourism sector
- mismanagement of resources

Tourism Opportunities for the Fort St. James Forest District

- the development of unique ecotourism products to meet market demands
- promotion of affordable tour opportunities to immediate close-in region
- the development of proactive, ½ day and 1 day local tour options to attract drive-by and group travel markets
- development of 1st class RV park in Fort St.

• pending road improvements — development and promotion of tours to Northern portion of the district • promote late fall as "prime" fishing season	James to attract overnight RV market • development of a "tourist train" utilizing the existing rail bed into the district • river rafting on the upper Skeena is world-class

Table 2: Common Tourism Development Issues in the Fort St. James Forest District

Tourism Development Issues & Concerns
• Lack of entrepreneurial skill development opportunities
• Very limited funding/financing assistance available to new tourism development initiatives
• Limited interest in new tourism product development by investors due to "uncertainty" of First Nations land claims
• Limited knowledge and awareness of tourism marketing needs by existing or potential tourism operators
• Inconsistent and at times poor delivery of tourism products and/or services
• Too many local/regional tourism suppliers are interested in "lifestyle generation" verses the development of a proactive and larger form of tourism operation
• Regional youth have limited incentive to enter the tourism industry
• Limited tourism training opportunities available in the immediate region
• The cost of air transport into/from the region (Prince George) greatly limits the development of in-bound tourism destination packages
• General lack of awareness and/or understanding of the regional tourism industry by regional residents
• A perceived understanding that 'tourism' is a "popcorn" industry with limited economic benefits
• A general lack of tourism infrastructure throughout the Fort St. James Forest District with the Northern portion suffering from extremely limited infrastructure
• Very limited resources available to assist a tourism entrepreneur in developing a new product or service
• A lack of awareness and utilization of existing products or services by the regional resident population
• Continuing use conflicts between different sectors of the recreation and/or tourism activity mix
• Limited support of the tourism sector from municipal and/or regional governments
• Poor tourism signing throughout region and some roadways are in need of significant upgrading in order to attract 2x2 touring
• Many existing tourism operators are small in nature, tend to be apathetic and/or complacent and

Tourism Development Issues & Concerns
do not necessarily participate in locally generated tourism initiative
• Permit and licensing regulations are horrifically confusing and unclear and therefore result in very limited tourism development initiatives
• Existing recreation and tourism products are very underutilized and require proactive marketing in order to increase use (prior to new products being developed)
• There is a general lack of networking between existing tourism product or service providers
• Continuing concerns regarding forest harvesting practices (i.e.: visual corridor management)
• Very limited regional/local tourism research statistics available for planning purposes
• At times, very negative attitudes among regional residents regarding the tourism sector
• Lack of in-bound destination tourism packages available to the travelling public
• Poor record on the implementation of tourism plans and strategies
• Government "red tape" greatly hinders any potential for the development of new or enhanced tourism products or services

Table 3: Common Tourism Development Opportunities in the Fort St. James Forest District

Tourism Development Opportunities
• Market existing tourism products and services within the Northern region of BC (close-in verses long haul)
• Place additional focus to capturing more of the RV market which is already travelling throughout the region and along the Yellowhead Highway
• Huge opportunity and dire need to develop additional, interpreted, cultural and heritage tourism products in region
• Better use should be made of existing infrastructure and products (i.e.: community facilities such as museums, local artisans, etc.)
• Hut-to-hut products should be developed for both inland products (hiking/backpacking) and fresh water products (i.e.: lake touring by canoe)
• Link products (destination lodge, wildlife viewing, fishing) to the BCR rail bed through the district
• Need to address the overall quality and attitude regarding the delivery of tourism products and services
• Regional/local tourism operators should undertake much more networking and package development with fellow tourism product or service providers
• Need to promote more "family" type of tourism opportunities for both close-in and long-haul markets
• Pressing need for communities or region to proactively seek out and encourage larger scale

Tourism Development Opportunities

tourism developments with professional tourism developers/operators

- With the development of larger scale tourism products (i.e.: larger resorts), local "lifestyle" operators will have an opportunity to increase their business through the partnering and sub-contracting of services to the larger operators
- There is a dire need for a 'tourism development manual' designed to assist burgeoning tourism entrepreneurs in planning and designing new tourism products or services
- The development of strategically placed "gateway" would greatly assist in developing a regional theme and providing tourist information and directions (at Highway #16 junction)
- Simple and easily attainable front line tourism training opportunities for both management and staff would assist in improving the delivery of tourism products and/or services
- The collection and analysis of visitor statistics should be greatly enhanced with communities utilizing a common survey format and methodology so that both 'local' and 'regional' visitor statistics are generated in order to assist in the planning and development of additional tourism products and/or services
- Cultural villages and destination lodges should be developed in recognition of the excellent product/market match that these products provide

Table 4: Tourism Development Workshop — Gitxsan Hereditary Chiefs

On February 3rd, 2000, Greg Meredith of Meredith & Associates met with twelve representatives of the Gitxsan Hereditary Chiefs to discuss both the Kalum Forest District and the Fort St. James Forest District — Forest Tourism Opportunity Studies. The comments provided by the Gitxsan Hereditary Chiefs are summarized below:

Desired Types of Tourism Development

- Cultural villages (& associated spin-offs);
- Eco-based & Cultural-based education;
- Interpretation of cultural products;
- Destination lodge development (if assured of cultural and environmental integrity);
- River rafting & canoeing;
- Fishing;
- Mountain climbing; and
- Adventure/ecotourism.

Unfavourable Types of Tourism Development

- Outside people coming in and developing products and 'doing it' without FN consultations;
- Poorly planned projects;
- Those causing negative environmental impacts;
- Those causing negative cultural impacts; and
- Projects which do not recognize / hire / train local FN workforce.

Concerns Regarding Tourism Development

- How (?) do FN "partner" with non-native initiatives?
- Far too much red tape with government departments hinder potential development;
- Forest harvesting activities threaten potential for tourism development;
- "Access" to land resources is a concern;
- Land title uncertainty — between government and FN as well as between FN groups (inter-nation boundary overlaps);
- Need for effective education and training of local residents;
- Uncertainty of local resident support for tourism development by the nations/bands;
- Overcoming existing prejudice,
- Non-native lack of understanding & recognition of Hereditary structure and system;
- Ongoing clashing between existing structures;
- Limited access to capital resources required to develop or enhance tourism products; and
- Over harvesting of potential tourism development lands and resources.

6.2 Tourism Development Recommendations and Next Steps

This section of the report deals with broader tourism and community development issues that cut across geographic boundaries and therefore suggest action at the regional level. The major topics addressed include:

- Community Development and Planning – community economic development functions that broadly impact tourism development.
- Business Development – services targeted at the private sector which are meant to stimulate new business activity.
- Infrastructure – basic inputs and services, often provided publicly, that are considered essential for community and economic development.
- Human Resources – initiatives dealing with human capital, including training and education

Exhibit 1: Summary of Recommendations

MAJOR TOPIC	RECOMMENDED ACTIONS
Community Development and Planning	• Implementation • Joint Tourism Planning • Values Identification • Community Positioning & Marketing • Communications • Commercial Recreation Tenure • User Group Agreements • First Nations Tourism Development • Monitoring and Evaluation
Business Development	• Tourism Product Packaging • Networking • Web Development • Research & Information • Investment Attraction
Infrastructure	• Signing • Trail Development
Human Resources	• Tourism Training and Education • Entrepreneurial Skill Development

Community Development and Planning

Implementation

Rationale

The recommendations made in this strategy will only yield results if there is some commitment to implementation; this is unlikely to occur with ad hoc efforts. Community-based tourism development is becoming increasingly complex and sophisticated, at a time when it is becoming harder to source funding assistance for priority initiatives. Communities in the FSJ area have finite resources and support and cannot reasonably be expected to deal with every issue and event in the community. One solution is to identify and prioritize strategic options, as is being done in this Strategy. Another solution is to leverage all available resources by networking, partnering and working co-operatively with other communities, agencies and the private sector so the region can build some momentum for implementation.

Actions

Distribute FTOS project report and resources.

Distribute opportunity information, including activity/product profiles and business planning guide, to local entrepreneurs and other stakeholders.

Promote map products.

Meet with tourism and community economic development stakeholders to prioritize key initiatives outlined in this study.

Develop a one year action plan focusing on initiatives that could be implemented on a regional basis but which assist with development in all areas.

Prepare a short-list of financial assistance programs for assisting with implementation.

Review financial assistance programs

Prepare a short-list of programs appropriate for outdoor recreation development

Flag programs that have near-term deadlines for submissions.

Prepare and circulate a two to three page "Tourism Financing" fact sheet among tourism stakeholders and solicit further ideas for project submissions.

When available from Tourism BC (January/February, 2001), obtain a number of copies of their Tourism Development Handbook, which is in the final development stage. This document has been designed with the tourism entrepreneur in mind and provides a step-by-step handbook for anyone looking at either getting into a new tourism venture or who wishes to enhance their existing tourism product and/or service.

Responsibility	Economic development commissions Community Futures Northern BC Tourism Association (NBCTA) Chamber of Commerce Heart of BC Tourism Association (HBCTA)
Potential Partners	Ministry Of Small Business, Tourism and Culture (MSBTC) Northern Development Commission (NDC) Tourism British Columbia (TBC) Heart of BC Tourism Association (HBCTA) Parks Canada {Canadian Heritage} (PC)

Community Development and Planning	
→	Joint Tourism Planning

Rationale

There are a number of organizations actively engaged in community economic development and tourism development in the surrounding area, but only a limited amount of joint planning takes place, even though there are a host of issues and problems that could be effectively dealt with at a regional level. This is particularly true of outdoor adventure tourism and ecotourism, where activity is dispersed over the regional land base, and where there tends to be a lot of shared infrastructure and market issues. It therefore makes sense for economic development commissions in Fort St. James, Vanderhoof, Fort Fraser, Fraser Lake and Prince George to collaborate and identify initiatives of mutual benefit, establish networks and consider joint actions, wherever possible.

Actions

Form a tourism action committee of Chamber and economic development commission representatives for collaborating on ecotourism development issues[1].

Compare and share tourism strategy information and identify areas for collaboration, especially where issues are regional in nature, such as transportation, infrastructure and highway signage.

Pursue funding sources within Crown corporations and utility company grant and foundation programs (BC Hydro, BC Tel, ICBC).

Establish an annual tourism symposium in partnership with interior communities for the purposes of joint planning, opportunity development and networking. Begin with a value and visioning process so ecotourism planning is given a proper community perspective in the region.

Consider compiling value and vision statements and recommendations from previous community planning exercises for land use decisions or other aspects of community development, including growth management. From these, identify common themes and development consideration that relate to how tourism development affects the local community and region.

Neighbourhood, community and regional levels of interest can be addressed to identify common themes and issues.

Assess tourism development impacts in other communities, prepare case studies and distribute them to stimulate local discussions about desired tourism impacts, values and visions.

Develop a community consultation methodology (e.g. interviews, workshops, community forums) to express clear vision statements.

Continue with the proactive initiative of forming the Heart of BC Tourism Association as a sub-regional tourism consortium to address product development and cooperative marketing initiatives.

Responsibility	Economic development commissions Heart of BC Tourism Association (HBCTA) Chamber of commerce
Potential	Ministry Of Small Business, Tourism and Culture (MSBTC)

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[1] Much of this recommendation is presently being addressed with the ongoing facilitation of the *Heart of BC Tourism Association*

Partners	Northern Development Commission (NDC) Tourism British Columbia (TBC) Heart of BC Tourism Association (HBCTA) Parks Canada {Canadian Heritage} (PC)

Community Development and Planning

Values Identification

Rationale

Tourism development can affect all local residents in a community or destination area regardless of how directly they are involved in the tourism industry. The tendency in tourism development is to focus on marketing and product development in efforts to meet tourists' expectations. While it is important to deliver tourism products, programs, and services that meet and exceed tourists' expectations, there is a danger of overlooking or sacrificing community and individual pride, culture, lifestyles, or land uses – especially in more remote or rural areas. A positive tourism experience – and lasting tourism industry – usually depends upon genuinely courteous interaction between local residents and tourists. To help ensure positive interactions, it is therefore important to "collectively itemize what values will not be compromised for the sake of growth[2]". By carefully identifying local values related to tourism development (hopes, fears, dreams, concerns), stakeholders can begin to shape tourists' expectations such that those most attracted to an area are indeed a good fit with the area's own development, lifestyle, and ecological needs and desires.

This can link with what is commonly referred to as "visioning" whereby multi-stakeholder input describes desired interim and end results from tourism development. Depending on previous visioning exercises, tourism specific values can be extrapolated from more broadly oriented community visions, and vice versa. Clarifying tourism-related values and future-oriented "best case scenarios" can similarly help when setting priorities for land use, lobbying and communications, community positioning, and implementation of tourism development strategies.

Actions

Compile value and vision-related statements and recommendations from previous community planning exercises for land use decisions or other aspects of community development, including growth management. From these, identify common themes that relate to how tourism development affects the local community and region.

Cross reference tourism-related values with what has otherwise been identified as limits of acceptable change (LAC) for sensitive areas experiencing development and use pressures.

Investigate case study profiles from tourism development impacts in other communities and regions to stimulate local discussions about desired tourism impacts, values and visions.

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[2] From "Rural Tourism Planning: A Community Development Approach", by A.M. Fuller & D.G. Reid, in Rural Rehabilitation: A Modern Perspective, Scott T. Smith (Ed.), Ahab Press, New York, 1998.

<table>
<tr><td colspan="2">Use a combination of interviews, focus group discussions, surveys, and community forums to determine whether there are common community values and visions for tourism development. Similarly, art, prose, theatre, or models could be used to express values and visions.
With First Nations' tourism development, ensure that initiatives reflect and uphold values otherwise identified in treaty, land, and resource use discussions and negotiations.</td></tr>
<tr><td>Responsibility</td><td>Municipality and Regional Districts
Tourism operators and industry associations</td></tr>
<tr><td>Potential Partners</td><td>Tribal Councils and First Nations Economic Development Corporations
Economic Development Agencies
Ministry of Small Business, Tourism and Culture (MSBTC)
Ministry of Community Development, Co-operatives and Volunteers (MCDCV)
Northern Development Commission (NDC)
Heart of BC Tourism Association (HBCTA)</td></tr>
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<table>
<tr><td colspan="2">Community Development and Planning</td></tr>
<tr><td>→</td><td>Community Positioning & Marketing</td></tr>
<tr><td colspan="2">Rationale</td></tr>
<tr><td colspan="2">A community development tool that is often overlooked is marketing - how well you sell your community to outsiders. Most communities don't have marketing staffs or consultants, though most have promotional brochures or videos, run ads in area development publications, or have home pages on the Internet. But how well a community is marketed is extremely important. Yet most communities do not devote half the effort to selling themselves as their local factory does to marketing its output.
This is important because even though communities aren't businesses, they do have customers — and competitors. That means that, just like businesses, they can benefit from marketing. Marketing can aid community development in a number of ways including attracting tourists. Key considerations in any community marketing program include:
Marketing Is Selling – It's not enough to have a brochure, video or home page that simply describes the community. Information is not enough. Selling is required.
Find Something to Sell - Never assume you do not have anything about your community you can sell. Sometimes, even perceived liabilities can be turned into assets.
Set the Community Apart – In marketing, the community must be set apart from the competition. Many community marketing efforts like brochures and videos are too similar. The community does not always have to be overwhelmingly superior to other communities. It can be enough to be 10 percent better in some important area. And sometimes it is possible to highlight things even where they are not really different. Mention could be made about advantages that other places also have</td></tr>
</table>

but usually fail to disclose. Communities that differentiate themselves in the minds of their customers can be successful.

Monitor Results and Test – Communities might be generally pleased with their marketing efforts, but do they know which parts are really producing and which they might well do without? Often, 80 percent of the results are coming for 20 percent of the marketing. To prepare successful marketing packages measure the results of current efforts. Then try something new and see if it works better. The fringe benefit of monitoring and testing is that it can save money. The biggest ads and fanciest brochures or videos are not always the most effective.

Use Data Selectively - Economic and demographic data on the community can be extremely potent if it is mined for items of value.

Actions

Conduct a market audit and tourism plan.

Identify key partners to provide assistance and resources in building a plan.

Evaluate the community, including an inventory of the area's best tourism assets, an action plan for their development based on specific job and income potential, an inventory of basic weaknesses, and a plan to reduce or eliminate them.

Assess preparedness factors of the community (e.g. appearance, community facilities, education and training systems, access to financing, access to Crown land, infrastructure and utilities/services).

Focus on identifying what is unique about Fort St. James and surrounding area.

Establish a common marketing image that could be branded for use in all forms of advertising and promotion.

Develop community marketing positions or themes around ecotourism products and distinctive features.

Schedule annual visitor surveys to generate reliable travel market data for local use.

Current InfoNetwork data is highly biased and there has been no scientifically reliable visitor exit survey in the region for about 10 years. Communities should be generating more visitor information for assisting with planning and development. While there are many assumptions made about current visitor markets, volumes and behaviour, the fact is that very little is known about who comes to the region and for what reason.

Prepare a schedule for a summer survey that covers as many local areas/sites as possible to ensure comparative data is available.

Acquire off-the-shelf survey software (e.g. Survey-It).

Prepare visitor survey instrument (see Appendix A).

Staff could be hired through one of the many summer student hire programs.

Co-ordinate this project with area high schools.

Responsibility	Economic development commissions Town Council Chamber of commerce

Potential Partners	Municipalities Regional District Community Futures Northern Development Commission (NDC) Canadian Tourism Commission (CTC) Parks Canada {Canadian Heritage} (PC)

Fort St. James Photo from www.roadwaves.com/media/stjmes

Community Development and Planning	
→	Communications
Rationale	
Communications are an extremely important function for those organizations involved with advancing tourism in the FSJ area, particularly in light of the fact that the industry is still considered incidental to the region's economic base and given little consideration as a serious economic contender by many residents, elected representatives and decision-makers. Strategically building awareness and understanding of tourism and its benefits throughout the region should be a priority along with specific project developments and initiatives. During the community consultation process for this project, workshop participants stated the following: The public had a poor awareness of tourism and its benefits/potential for communities. The region's youth were not aware of tourism job and career potential.	

Businesses and entrepreneurs were not aware of opportunities for tourism development.

These statements hint at an apathetic attitude, or worse an underlying resistance, toward tourism development that will make it difficult to generate the economic benefits the region is capable of. Historically, tourism in the FSJ area has been based on the sport fishery, highway touring and the Historic Park. Travellers are demanding more in terms of a tourism experience and the industry has to work much harder to build a competitive product and attract markets with an ever-increasing choice of destinations. Communities that have a flexible and well-trained workforce, competitive operators, strong industry linkages, good infrastructure and broad community support for tourism will come out ahead. Before these essential building blocks are in place in the FSJ area, there will have to be consistent and well planned communications to overcome apathy and pave the way for developing a tourism culture that will be critical for future success.

Actions

Prepare a communications plan outlining procedures for promoting positive tourism-related events in the community, and outside the community. This would include developing a database of key media contacts and refining criteria for deciding upon what makes a newsworthy event.

Ensure political representatives are targeted in the communications program.

Identify opportunities to have major industry collaborate with tourism businesses on tourism projects and promote these projects to communities as a way of overcoming popular misconceptions that development in tourism usually means economic loss for some other industry (i.e. that economic development is somehow a zero sum game).

Prepare an annual report card on the progress of tourism development in the region, identifying and tracking project developments and communicating these to media contacts and stakeholders.

Prepare a newspaper tourism column with collaboration by EDOs and Chamber.

Investigate a ***tourist in your own town*** program:

These programs are very popular in the US and Canada and involve giving residents an opportunity to sample attractions, tours and restaurants at reduced prices.

One option is to create and sell a passport with money-saving coupons from attractions, lodging and dining establishments. Tourism businesses can be asked to provide incentives such as percentage discounts, 2-for-1 offers or value-added gift items. In return, participating businesses benefit from increased traffic and visibility through the passports.

Responsibility	Economic development agencies Operators	Municipal government Chamber of Commerce
Potential Partners	Human Resources Development Canada (HRDC) Ministry of Community Development – Enterprise Program, Community and Co-operative Business Development sub-program Heart of BC Tourism Association (HBCTA) Parks Canada {Canadian Heritage} (PC)	

Community Development and Planning

Commercial Recreation Tenure

Rationale:

Commercial Recreation (CR) tenure has the potential for significantly shaping the future of tourism in the FSJ area over the long-term because it will confer certain rights of access and use of the land base to licensees. For this reason, communities should be acting now to ensure their concerns and interests are being met.

The issuance of CR tenures may not be a process to which the public currently attaches much importance, perhaps understandably if they also consider tourism to be a minor economic player in the region. But there may be considerable risk in assuming that decisions being made now in granting tenures may not have increasingly important implications, both economic and social, down the road. Even though all Crown tenures have terms and conditions attached, once they are issued, they are unlikely to be revoked and they will carry considerable value assuming that the resource use they confer will come under increasing demand. In forestry, Crown tenures such as TFLs and forest licences are the very basis of industry supply. This may be true of commercial outdoor recreation in the years ahead and FSJ should be ensuring that local community economic development considerations and criteria are built into the permitting process. It is not inconceivable that the most valuable tenures in the region may go to operators or businesses outside the region and thereby limit the local impacts that could be generated by the region's tourism resources.

Actions

Monitor use of existing tenures to determine whether there is under-utilization and thus potential for additional commercial activity through re-issuance.

Lobby BCALC to ensure that community needs are factored into the approval process for commercial recreation tenure.

Rather than adhering to strict economic efficiency criteria when assessing applications for commercial tenure, BCALC should be encouraged to adopt Ministry of Forests Small Business Forest Enterprise Program (SBFEP) assessment guidelines. For Section 21, value-added timber sales, bidders are given higher scores if they will process the timber in the local community. A similar approach for commercial recreation tenure would ensure that prospective operators carefully consider doing more business in communities nearby the operating area.

Responsibility	Municipality Regional District Economic development agencies
Potential Partners	British Columbia Assets and Land Corporation (BCALC) Ministry of Forests (MoF) Ministry of Environment, Land and Parks (MELP) Heart of BC Tourism Association (HBCTA)

Community Development and Planning

→ User Group Agreements

Rationale:

Many people use Crown land for recreation. As that use and the variety of different users increases, conflicts are bound to arise. In the FSJ area, there are several locations where resource use conflicts have flared up in the past, threatening relations between commercial operations and public recreation. Overcrowding of prime fishing spots and disputes between motorized and non-motorized winter recreation users in the alpine around FSJ were two examples brought forth during the consultation process. Community Recreation (CR) policy and planning by BCALC will gradually be refined and streamlined to provide a basic support for commercial recreation in the North, but it is unlikely to be a panacea for all disputes that arise between commercial operators, and it certainly will not provide solutions for disputes between operators and other resource users. User-group agreements have emerged in other jurisdictions as a valuable and complementary tool to CR planning and should be actively encouraged in the FSJ area before disputes become too polarized and entrenched. Locally produced agreements can often prove effective mechanisms for dispute resolution because they are able to account for local values and interests without the perception that decisions are being made outside the community.

Actions

Consider producing a recreation use code-of-ethics to assist commercial recreation operators self-management of conflicting use. A less formal education brochure could also be prepared by Chamber of Commerce and distributed to local recreationalists and visitors.

Identify areas where there may be concerns about Carrying Capacity or Limits of Acceptable Change (LAC).

Responsibility	Municipalities Regional District Economic development commissions
Potential Partners	British Columbia Assets and Land Corporation (BCALC) Ministry of Forests (MoF) Ministry of Environment, Land and Parks (MELP)

Community Development and Planning

→ First Nations Tourism Development

Rationale:

While the overall tourism industry is growing by approximately 3 percent to 5 percent every year, resource-based tourism or ecotourism may be growing by as much as 15 percent to 25 percent. First Nations tourism, where aboriginal people are directly involved through control or having their culture serve as the primary attraction, is an important component of these high growth rates in resource-based tourism. But without a sense of the unique challenges and opportunities that exist within First Nations' communities, successful tourism development will be elusive, if not impossible. Specifically, the need for community control of tourism development and the necessity for outsiders to create effective relationships with the community are crucial. This mandate has been given legal force with the settlement of the Nisga'a treaty, but it is equally important for all First Nations.

With cooperative community support and control, tourism has the potential to stimulate economic and social development and provide a mechanism for re-establishing aboriginal approaches to land use and resource management. More activity along these lines will help rebuild capacity within First Nations communities, affirm cultural values and traditions, empower and strengthen community pride, create employment, generate revenue, provide training and educational opportunities and facilitate cultural exchange. In other words, tourism development can lead to overall community development.

There is an opportunity in the FSJ area for achieving First Nations tourism development through the creation of partnerships, networking and relationships that will bring together all available regional assets into a single development path.

Actions

Conduct an aboriginal tourism development conference in the FSJ area.

Ensure linkages are made with major aboriginal tourism organizations, including the Aboriginal Tourism Association of British Columbia (AtBC), the Canadian National Aboriginal Tourism Association, and Aboriginal Tourism Team Canada (part of the Canadian Tourism Commission).

Investigate uses for programs currently offered to meet assist First Nations tourism development, including the BC government's *Visions for the Future*, a series of career development conferences for aboriginal youth, and the *Royal BC Museum's Aboriginal Cultural Stewardship Program* for aboriginal youth interested in working in native culture interpretation.

Promote joint ventures between experienced tour operators and First Nations

Responsibility	Economic development agencies Community Futures Local/regional FN Bands Heart of BC Tourism Association (HBCTA)
Potential Partners	University of Northern British Columbia (UNBC) College of New Caledonia (CNC) Aboriginal Business Canada (ABC) Northern Development Commission (NDC) Ministry of Community Development, Co-operatives and Volunteers (MCDCV) Heart of BC Tourism Association (HBCTA) Parks Canada {Canadian Heritage} (PC)

Community Development and Planning

Monitoring and Evaluation

Rationale

Communities involved in tourism development should regularly monitor and evaluate their activities for a number of reasons. First, it is important to know whether the community is making progress towards achieving its goals and objectives. It is easier for other people in the community to get involved when they understand what is being achieved and why their involvement might make a difference. Second, monitoring and evaluation can greatly help the organization manage and allocate its resources. Third, capacity-building within the community is enhanced if organizations and partners are able to gauge and improve their performance in pursuit of broader community goals. Finally, monitoring and evaluation can be an effective communication tool for the advocates, as the information can be used to encourage community involvement and to inform decision-makers about tourism impacts and opportunities.

Actions

In monitoring projects, the following points should be kept in mind:

Remain vigilant for signals of change to underlying assumptions.

Be prepared to change goals, strategies and monitoring procedures as projects are implemented.

Tourism and economic development practitioners should identify indicators and measures for new projects as the basis for monitoring.

Hold regular meetings.

Regular meetings among project participants should include a check-up of any portion of the action plan falling within that time period. Changes in resources, people, or information that will affect strategies should be noted and acted upon.

File regular monitoring reports.

Project managers should prepare regular monitoring reports showing progress on the action plan.

Conduct community public meetings or surveys on an as-needed basis to maintain community involvement and interest.

Conduct case analyses on one or two major initiatives. At least one evaluation should be on an initiative in progress and one on a completed project. Issues to assess include the following:

Rationale - Was the rationale for the project well conceived? Did it meet logical ends? Does the need still exist? Is there still community or industry support for the activity?

Efficiency - Was the program administered efficiently? Did the resources go to the purposes intended? Were quality outputs produced in a timely manner?

Effectiveness - Were goals achieved?

Impacts - Were there desirable/undesirable impacts or spin-offs not directly associated with the project?

Responsibility	Municipality

	Regional District Economic Development Agencies
Potential Partners	Heart of BC Tourism Association (HBCTA) Northern Development Commission (NDC) Northern BC Tourism Association (NBCTA)

Business Development

→ Tourism Product Packaging

Rationale

Tourists do not always want just the product or experience that an individual operator offers. Increasingly, they are demanding a variety of experiences, as many built-in services as possible, and a choice of trip attributes such as length of stay, accommodation options and degree of risk/challenge. This is placing more pressure on operators to be flexible and adaptive to market demands at a time when many are reluctant or unable to meet the challenge and be competitive. Outdoor tourism operators tend to be small businesses that directly sell to travellers, often without marketing intermediaries or in co-operation with other operators. Therefore they may be missing an excellent opportunity to broaden their appeal and increase business through the provision of more diversified and customized tourism products. The way to do this, of course, is through packaging. Appendix A contains a briefing paper on developing tourism packages.

Packaging can be conducted with other complementary operators or even with similar operators. During consultations, many suggestions were made for packaging new and innovative products/experiences (e.g. family-oriented activities, museum/historical/cultural tours, and "wellness" products) with the more conventional outdoor products like fishing, cross country skiing, etc.

Actions

Seek professional technical assistance for entrepreneurs from the Province to continue the process of building tourism packages, particularly for small groups utilizing local transportation, accommodation, meals, and tour guides.

Identify a short-haul market (e.g. Vancouver or Edmonton) for package promotion on a pilot basis.

Prepare and market product packages for the regional market (e.g. Prince George).

Identify products/activities with the greatest appeal for the regional market.

Identify trade shows and fairs in Prince George (and elsewhere in the Northern region) where packages could be inexpensively marketed.

Encourage operators to increase exposure through regional tourism conferences.

Host a tourism workshop on packaging.

Identify a product package for promotion among interested operators, detailing composition and pricing. Ensure that:

Demand-generators (e.g. highly appealing experiences and activities) are included, rather than simplified product statements.

All necessary services are included.

Compatibility between package components.

Pricing is competitive, but profit is assured.

Ensure packages are included in Tourism BC's travel agents' manual of tour packages.

Ensure packages meet the provinces guidelines (see following table).

Host multi-day familiarization (FAM) trips with a select group of Vancouver, Alberta and Washington-based tour operators and travel trade representatives.

Increase distribution of packages through visitor centres.

Encourage the establishment of additional inbound tour operators, focusing on increasing penetration of highway travellers for adventure product sales.

Use the FTOS inventory of operators to assist with assessing packaging opportunities and for helping operators get in touch with one another.

Research mailing lists for tour operators in North America and long-haul markets who can be targeted for products available in the region.

Consider marketing in a co-operative marketing group (HBCTA, NBCTA, and TBC).

Marketing was identified as a business skill gap by many of the survey respondents, and companies such as Fresh Tracks, an inbound soft adventure tour operator with 55 adventures in BC, Yukon and Alaska, have shown that collective packaging and marketing can be profitable. Fresh Tracks is a marketing organization which obtains the clients and then contracts to 28 outfitters and guides for the on-the-ground trip experience.

Prepare a product guide for the FSJ area that would list tourism services, an events calendar, accommodation guide, adventure and recreation operators, attractions and transportation services.

Identify who is currently providing packages within the region.

Share the product guide with all operators.

Work with NBCTA to take full advantage of Canadian Tourism Commission (CTC) marketing and packaging programs. Several of CTC's programs could be utilized locally, but only once a consortia of interested stakeholders was formed. Programs such as the Regional Tourism Marketing Initiative program[3] and the Adventure program[4] could be the impetus needed to generate more packaging locally.

Responsibility	Heart of BC Tourism Association (HBCTA) Chamber of commerce

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[3] http://www.canadatourism.com/en/ctc/partner_centre/partnering/can/tablecont.html

[4] http://www.canadatourism.com/en/ctc/partner_centre/partnering/can/tablecont.html

Potential Partners	Northern BC Tourism Association (NBCTA) Northern Development Commission (NDC) Tourism British Columbia (TBC) Human Resources Development Canada (HRDC) Parks Canada {Canadian Heritage} (PC) Canada-BC Service Centre – PEMD-I Program Ministry of Community Development – Enterprise Program, Community and Co-operative Business Development sub-program.

The following criteria are used by Tourism British Columbia when determining if a supplier is ready to work with Tourism BC in offering "export ready" product to international markets:

Suppliers Must::

- Be in business at least one year, with a proven track record for safe and professional operation.Demonstrate an adequate budget and marketing plan that includes international tour operators.
- Understand the roles played by receptive tour operators (RTO's), tour operators/travel wholesalers, and retail travel agents. This includes an understanding of rack or retail pricing, agent commissions and wholesale net rates and client relationships at each level.
- Be willing to include receptive tour operators in your marketing and sales plan, and implement a regular sales call program directed toward these operators.
- Be willing to provide contracted wholesale net rates to receptive tour operators. As a general guideline, requirements are: 15% off the retail price for day activities and transportation and 20-30% off retail pricing for accommodations (higher discounts are common for volume production).
- Honour the contracted net rates, no price changes before the expiry of the contracted agreement.
- Provide detailed pricing and program information to tour operators and receptive operators at least one year in advance of selling season, i.e. May 2000 for the summer/fall 2001 season.
- Be prepared to communicate and accept reservations by telephone, fax and/or e-mail. Provide same-day confirmation of booking arrangements.
- Set up billing arrangements with the operator, agency or receptive tour operator. Accept client vouchers as confirmation of payment for reservations.
- Determine business priorities in terms of group or FIT business. If you plan to pursue group business, consider access by tour buses, parking/turnaround areas, washroom facilities etc. Determine your maximum group size.
- Carry adequate insurance (minimum $3 million liability insurance for adventure product suppliers is recommended). Discuss this with your receptive operator (sometimes they can add suppliers to their existing policies at nominal cost).
- Provide support (free or reduced rates) for international media and travel trade familiarization tours.

In addition to the above, the following should be considered "next steps" for consideration as business and market presence expands:

- Consider attending travel trade shows involving international buyers, either in North America or overseas.
- Expand the sales call program to include overseas contacts as well as Canada-based receptive operators.
- Be prepared to provide tour operators and media with 35mm slide, CD-ROM or standard computer format images of the product or operation, for use in brochures, promotions and editorials.
- Consider producing video footage of product or operation for promotional and training purposes.
- Consider development of a website offering information on your product.
- Be prepared to adapt to uniqueness of certain overseas markets. Flexibility may be required with regard to last minute bookings and changes.
- Consider hiring frontline staff that speak the language of the markets you are interested in pursuing.

Business Development

→ Networking

Rationale

Some of the comments received from industry contacts made during this project revealed that some operators felt "unconnected" and uninformed because there was no business network through which they could make referrals or share information. Building business networks and linkages can generate significant economic development opportunities as well as cost savings for businesses. Other strategies in this report such as packaging imply some form of operator network – the more vigorous the network, the more likely the industry will attain competitiveness and generate positive economic benefits for the community. Better workforce training linkages, the establishment of mutual infrastructure (e.g. trail systems), the development of a local supplier network, and co-operative marketing are some of the achievements possible through network development. Sharing of strategic planning information, from outlining key business objectives to explaining the obstacles in building critical social and economic ties to the community can benefit all communities in the FSJ area, especially First Nations' communities where business capacity is currently limited.

Actions

Work with all products and services in the region to prepare a regional tourism database (e.g. Product Guide).

Accommodation facilities, adventure operators, attractions and transportation companies could all be listed in a single, relational database, using the FTOS results as a baseline.

Devise a method for maintaining the database on an annual basis.

Distribute the Product Guide to all operators as a resource for encouraging more networking and packaging.

Prepare an email list of local operators, community and government contacts that can be targeted for receiving press releases and other communications (i.e. listserve[5]). Best practices in ecotourism business development could also be promoted.

Share information on common issues such as signage, land use, CR tenuring and infrastructure.

Investigate the feasibility of forming a "Product Club" in the FSJ area.

The Product Club program[6] is administered by the Canadian Tourism Commission for the purpose of encouraging tourism consortia to develop market-ready products. A consortium of small and medium-sized businesses that agree to work together in order to develop new tourism products or enhance existing products which will collectively address issues that are impeding the growth of tourism in a given area or industry sector. A typical Product Club is an independent entity, which could include outfitters, tour operators or tourism associations. Research (on markets, on products, on initiatives in other jurisdictions), workshops/seminars for club members, developing a product development plan, developing a sales strategy, communication tools (e.g. newsletters, meetings) are examples of supported ventures.

A meeting could be held with outdoor tourism stakeholders to gauge the level of interest in forming a product club. An example in BC are the 75 Canadian members of the consortium *Trail of the Great Bear*, made up of operators in the food and beverage, transportation, accommodation and soft adventure industry, which promote touring, ecotourism and cultural/heritage products within the Trail of the Great Bear region (Rockies area of Alberta and British Columbia). The Product Club will create year-round barrier-free touring packages through an enhanced communication strategy, research to identify market potential, and a model that can be used in other regions.

A proposal call for Product Club submissions is issued in the Fall each year.

Responsibility	Heart of BC Tourism Association (HBCTA) Local/regional tourism operators Chamber of commerce
Potential Partners	Canadian Tourism Commission — Product Club Program Northern BC Tourism Association (NBCTA) Tourism British Columbia (TBC) Parks Canada {Canadian Heritage} (PC) Northern Development Commission (NDC)

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[5] Listserves come in two forms, Discussion Lists and Announce Lists. An Announce List is used to quickly distribute important information to all subscribed members.

[6] http://www.canadatourism.com/en/ctc/partner_centre/shortcutindex.cfm?info=productclubs/productindex.html, (613) 946-1000.

Fort St. James Photo from www.roadwaves.com/media/stjmes

Business Development

→ Web Development

Rationale

Currently, the Internet is not a major factor either for the markets travelling to the region or for the operators who are providing products and services. However, feedback from successful operators suggests that Internet use can be very effective in terms of generating interest, controlling operating costs and expanding marketing reach, especially when dealing with international visitors. Companies like Fresh Tracks generate more than half of all their sales through their web site.

While some tourism operators have developed sophisticated web sites and email systems, many more in the FSJ area could benefit by having a stronger Internet presence. The community of FSJ can work with operators on Internet development by identifying resources and assistance for web site development, encouraging best practices in design and operation, providing digital information about the area and its resources that could complement product-specific marketing and by encouraging local indexing and linking of sites (especially to high volume sites).

Actions

Evaluate web-site effectiveness.

Use the University of Illinois' "Thumbs Up – Evaluating Community Websites" tool for reviewing best practices in web site design[7]

Solicit examples of guided tours and packages that could be featured as a main tourism page on the regional websites.

Maintain a tourism links page to important tourism websites as a reference for local tourism stakeholders. The Canadian Tourism Commission[8] and the SFU Centre for Tourism Policy and Research[9] have excellent links' pages.

Undertake steps for gathering more information and data-mining from website visitors.

Identify target Internet sites for co-marketing or placement of creative banner ads to link regional websites.

Responsibility	Chamber of commerce Heart of BC Tourism Association (HBCTA) Private operators/suppliers Community networks Economic development commissions
Potential Partners	University of Northern British Columbia (UNBC), College of New Caledonia (CNC), Northwest Community Collage (NWCC) (student assistance for project design and implementation) Community Access Program (CAP)

Business Development

→	Research and Information

Rationale

The advent of the Internet has made the concept that knowledge is power truer than ever. The Internet has become a medium for idea generation, industry intelligence, professional and career assistance, communications, and strategic real-time marketing of communities and businesses to the outside world. The economic development commissions in the study area have to wear the hat of information broker to remain effective. More and better access to information and communication tools provides tourism operators with the strategic day-to-day data and knowledge to set priorities and agendas, and to improve their competitiveness. A first step is to provide access to information resources, such as important trends and developments, which was identified as a need by survey respondents. This would cover primarily links to government sites, statistical sources and research facilities that make available information on tourism issues. A second area of action is in community tourism planning. Unlike other resources sectors, tourism is dominated by small business – the development of backcountry recreation will depend in large part on the extent to which communities can help local operators create mutually beneficial relationships with each other and

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[7] http://www.ag.uiuc.edu/~lced/commtele/thumbsup.html

[8] http://www.canadatourism.com/index_ct.html

[9] http://www.rem.sfu.ca/tourism/

with those businesses that collectively provide the tourism experience.

Actions

Economic development agencies should ensure that they undertake market research on backcountry products, markets and trends, using the web site as the main venue for communication.

Subscribe to membership in the Pacific Rim Institute of Tourism (PRIT).

Promote the availability of the wide range of newsletters, statistical sources and studies/reports from PRIT.

Broker access to PRIT resources by individual operators in need of assistance.

Consider establish an ecotourism resource library in Fort St. James by duplicating PRIT resources.

Develop a one-time project proposal, with costing, for creating an instant library locally. Project sponsors could then be solicited for funding. The project should be of interest because it would have a well-defined outcome and generate immediate benefits as a resource centre for tourism stakeholders.

Promote the existence of MoF recreation maps, and other related map-based products to visitor markets to increase awareness of the full range of possible outdoor activities.

Prepare a "Good Practices" manual for distribution to new operators, particularly those from outside the community. The manual would outline the benefits to the community and the operator of good practice fundamentals and encourage operators to hire and buy locally.

Produce and distribute a tourism business planning guide for local entrepreneurs. This product could act as a local/regional add-on to the forthcoming *Tourism Development Handbook*, which will be available from Tourism BC in early 2001.

Ask banks to assist with outlining financial planning requirements for operators.

Responsibility	Economic development agencies Community Futures Chamber of Commerce
Potential Partners	Human Resources Development Canada (HRDC) Ministry of Community Development – Enterprise Program, Community and Co-operative Business Development sub-program. Local banks Northern Development Commission (NDC) Heart of BC Tourism Association (HBCTA)

Business Development

→	Investment Attraction

Rationale:

Community economic development practitioners often offer site selection services to encourage businesses and entrepreneurs to relocate in the community. This is one of the many tools used to attract new businesses into the region, and to retain existing businesses that might want to expand or relocate to some other location. The problem with resource-based tourism development is that getting access to the appropriate information and packaging that information in a convenient format has been a difficult, if not impossible, task. Now that MSBTC and BCALC have compiled map-based information about outdoor product capabilities in the FSJ Forest District, there is an information tool that Economic Development Officers can use to encourage new activity and guide their attraction efforts for tourism development. There are many advantages to identifying and packaging site information. First, the community has a way to get involved in Crown land use and disposition rather than leaving all decisions up to provincial decision-makers. Second, the community can be proactive in identifying where the preferred sites are and planning around them. And third, it gives the community a marketing and business development tool.

Actions

Encourage the completion of a tourism development site guide.

Local economic development agencies could prepare a site guide for tourism development in conjunction with BCALC.

The idea of actively identifying and promoting sites with favourable development prospects makes sense in terms of land use and investment attraction. For agencies such as BCALC, such a product is valuable because it has a chance to review and pre-approve sites that may be targeted in applications for Crown land tenure and sale. For communities and regional districts, the guide could be featured in their marketing and attraction programs, as well as assist with the forecasting and planning for future infrastructure and services.

The initial focus could be on remote fishing lodges, or alpine huts/lodges with high quality resources, no use pressures and high probability for tenure.

Encourage BCALC and the MoF to take a cooperative, inter-agency approach to the marketing of tourism tenures.

Prepare a handbook for helping tourism developers negotiate the land use process in establishing their businesses.

An investor's guide could be refined to target tourism projects. A flow chart format, which detailed the process an investor would have to follow in obtaining the requisite land and tenures, would be invaluable. While a single flow chart that tries to track the steps for all development possibilities might prove to be a bit too complicated for presentation, there may be an opportunity to prepare a flow chart that outlines the basic steps, appended with case studies providing more detail for specific projects and products.

Responsibility	Economic development agencies Community Futures Chamber of Commerce
Potential Partners	British Columbia Assets and Land Corporation (BCALC) Ministry of Forests (MoF)

	Northern Development Commission (NDC) Ministry of Community Development, Co-operatives and Volunteers (MCDCV) Ministry Of Small Business, Tourism And Culture (MSBTC)

Infrastructure	
↳	Signage and Gateways
Rationale:	
The BC government, through the Service and Attraction Signage Program, administers standardized directional signage for tourism-related services and facilities throughout the province. The system is based on a classification of highways and sets out sign policies by type of business for each class of highway. Unfortunately, existing policies have managed to produce a very utilitarian inventory of tourism signage that lacks the marketing savvy and power which operators needs to draw more visitors off the highways and into their facilities and into local communities. While influencing provincial highway sign policy may not be a realistic objective in the short-term, there are other avenues of action a community can take to improve tourism signage, including working with the MoTH for special theme signing and improvements to regional and local government signage policy. A well-co-ordinated signage program can generate many benefits for the community by improving access to essential services and facilities, promoting visits to operators and their attractions and by enhancing the overall profile of tourism in the region.	
Actions	
Develop a route name (such as *'Exploring The Lakes'*) as well as a route guide that will allow visitors/explorers with an easy to follow tour throughout the plethora of lakes north of FSJ. Establish a partnership of interested organizations, including the Heart of BC Tourism Association, Chamber of commerce and economic development commissions. Develop a theme and design concept for presentation to MoTH. The idea would be to prepare new signage for key turnoffs and to direct visitors through the myriad of forest service roads. An agreement could be struck whereby stakeholders could contribute funds for concept design, while MoTH would prepare and erect the signs. Prepare a regional Signage Design Manual in conjunction with the regional district and municipalities. Consideration should be given to four types of signs: community, advanced warning, trail and facilities. Develop a set of consistent themes that will appear on signs, for example to feature different product opportunities such as wildlife viewing, access points to recreational features Plans should be made to erect gateway signage for entrance to FSJ and the northern lakes.	
Responsibility	Municipality and regional district Chamber of Commerce Economic development agencies

	Heart of BC Tourism Association (HBCTA)
Potential Partners	Ministry of Transportation and Highways (MoTH) Northern Development Commission (NDC) Ministry Of Small Business, Tourism and Culture (MSBTC)

Infrastructure	
	Trail Development
Rationale:	
Trails are essential for providing public access for a wide variety of outdoor activities from sightseeing and wildlife viewing to mountain climbing and mountain biking. Walking and hiking in the natural environment is expected to be one of the fastest growing segments of outdoor recreation over the next 20 years. Trails provide visitors with first-hand opportunities to understand, appreciate and enjoy key scenic and natural resources, themes and values. It is for these reasons that organizations like Parks Canada have placed a priority on creating a high standard of presentation and access to recreational opportunities through trails. Unfortunately, there are very few developed trail networks in the FSJ area, despite there being some excellent potential for linking together high quality features in a natural setting. And the options for trail building and maintenance are fewer now than they were in the recent past years, when Forest Renewal BC was extensively involved in funding recreation projects. That funding has almost dried up and both community groups, as well as MoF recreation programs, will suffer as a result. This will place more pressure on regions to come up with local solutions for building and maintaining their trail systems.	
Actions	
Assemble research on best practices of trail development. There are numerous resources available both in hard copy form (e.g. Pacific Rim Institute of Tourism) and on the Internet. Review Parks Canada's best practices examples for trail development. Although the focus is on in-park development, most of the assessment tools and planning guidelines are applicable to any trail system Undertake a community recreation plan dedicated to trail system development, with particular attention to the following issues: Identify and develop an integrated multi-use trail system for land-based and winter-based products. Propose solutions for separating uses into specific zones. Dedicated mountain biking trails in close proximity to Fort St. James might be a first step. Lobby the MoF for increases in the recreation budget to be targeted at trail maintenance. While this would only address MoF's trail inventory, there would at least be some effort to maintain the trail system. Research should be conducted into implementing a user-pay system for furnishing the resources needed for ongoing trail maintenance, as the BC Snowmobile Association does with its members. Prepare a pre-feasibility of heritage trail development in the FSJ area, focusing on the Telegraph	

Trail.

Review status of management planning with MoF and MSBTC on these systems.

Request assistance from MSBTC and NBCTA for assistance in plan development.

Investigate the feasibility of tapping into the E-Team Program[10] for trail development in the FSJ area.

The program is part of Youth Options BC delivered by the Ministry of Environment, Lands and Parks and directed at youth aged 16 to 24. Projects must have an environmental or outdoor recreation focus, and 20 per cent of project time must be dedicated to training and developing skills for future employment.

Responsibility	Economic development agencies Local recreation clubs with trail interests Commercial operators with trail interests
Potential Partners	Forest Renewal BC (FRBC) Ministry of Forests (MoF) Ministry Of Small Business, Tourism and Culture (MSBTC) Northern BC Tourism Association (NBCTA) Heart of BC Tourism Association (HBCTA)

Human Resources

Tourism Training and Education

Rationale:

Workforce development is one of the more difficult tasks not just for tourism but for the economy at large. The workforce is changing drastically from an industrialized production era to a high-tech, value-added, knowledge-based production of the information intensive industries of the future. These changes are leaving many workers under-employed and unemployed. Many workers will need to learn totally new skills to survive and become competitive in the new workforce of the future. Those who do not will find work harder and harder to find. Communities involved in tourism development need to be aware of this situation and to focus efforts on providing opportunities for gaining the advanced skills necessary for new workforce demands. In addition to these training demands, there are new challenges such as developing strategies to keep youth in the community and the attraction of workers into the local labour market. Challenges include:

Determining the workforce needs of local tourism businesses in order to be effective and competitive.

Creating local training programs to address these needs.

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[10] http://www.youth.gov.bc.ca/programs/eteams.asp

Recruiting trainees among youth and other workforce participants.

Communicating tourism employment opportunities and careers to the workforce.

By paying attention to local training and education capacity, communities can increase the economic impacts of tourism development because operators will be more likely to source their staffing needs locally. Personnel trained locally are more likely to be aware about local environmental, social and economic issues and be advocates for the region rather than just the business itself.

Actions

Promote tourism career opportunities to the workforce.

The stereotype of the low-paid tourism job is not entirely accurate. There are a range of occupations that require a variety of skills and training, and earnings reflect these differences. Industries with an important tourism component where weekly wages are above the sector average include air transport, museums and archives, auto and truck rental and travel services. Even the entry-level jobs in tourism which are low-paying provide an opportunity for new workforce entrants to gain experience and ascend to better positions at higher pay. The seasonal and part-time positions available in tourism can be a valuable source of employment for those members of the workforce who may not want full-time work, for example because of family obligations.

Identify ways to increase partnerships between operators and students (e.g. guide mentoring or apprenticing program). A mentorship program can be highly effective method of in-the-field training.

Expand use of NBCTA, College of New Caledonia &/or UNBC training opportunities.

Encourage the use of SuperHost tourism training program developed by the MSBTC.

Utilize the training materials and resources of the Pacific Rim Institute of Tourism (PRIT), which maintains a reference library containing a variety of manuals and videos widely accessed by the tourism industry.

Responsibility	Economic development agencies Community Futures Heart of BC Tourism Association (HBCTA)
Potential Partners	Human Resources Development Canada (HRDC) Northern Development Commission (NDC) College of New Caledonia (CNC) University of Northern British Columbia (UNBC) School districts Northern BC Tourism Association (NBCTA)

Human Resources

Entrepreneurial Skill Development

Rationale:	
Entrepreneurship (the conception of both business and non-business enterprises in all their forms) is one of the keystones of community economic development. Entrepreneurs are the risk takers, innovators and agents of change who will generate new business development and improve the economic and social welfare of the community. Entrepreneurs can sometimes be attracted to a region, but the best prospects for future prosperity reside in those communities which have successfully developed their own culture and spirit of entrepreneurship. Entrepreneurs are not born - they have to be educated, nurtured, and assisted in an environment that will allow them to realize their potential. A community that values and encourages entrepreneurship will have a much more valuable tool for adapting to change and developing a prosperous economy. Entrepreneurship is important for tourism development in the FSJ area. Economic development practitioners are concerned that the school system is not developing young entrepreneurs who could lead economic change in the future, especially in tourism where new ideas and innovations are needed.	
Actions	
Assess demand and potential for young entrepreneur programs. There are resources available for encouraging young entrepreneurs. Junior Achievement and the province's You BET program[11] are both targeted at youth entrepreneurship. A Junior Achievement program would be a longer-term project because it requires more forward planning, but You BET could easily be delivered in the short-term, providing enough interest was shown by area youth. You BET consists of a series of one day workshops aimed at introducing youth to entrepreneurship as a career option. It can be delivered by the Ministry of Small Business, Tourism and Culture free to the community, provided there is a demonstrated need and demand. Support career preparation programs that support both entrepreneurship and tourism/recreation. Assess feasibility of Fort St. James Skills Centre delivery of short-duration seminars and courses targeted at existing operators. Operators and local residents could be surveyed to gauge the level of interest in courses.	
Responsibility	Economic development agencies Community Futures
Potential Partners	Human Resources Development Canada (HRDC) College of New Caledonia (CNC) University of Northern British Columbia (UNBC) School districts Heart of BC Tourism Association (HBCTA) Ministry Of Small Business, Tourism and Culture (MSBTC)

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[11] http://www.youth.gov.bc.ca/programs/youbet.asp

6.3 Concluding Remarks

The Fort St. James Forest District, a very accessible tourism destination in a world-wide market, is in a prime area of BC for tourism development. It has magnificent scenic resources, with abundant natural and pristine wilderness areas. The region has diverse opportunities for mountain and river recreation, camping, wildlife viewing, and a range of other tourism and recreation activities. These resources are supported by a range of attractions, parks, and facilities that can cater to tourism and recreational needs. However, tourism products targeted at the outdoor, adventure, culture and heritage tourism markets do not at present meet market demands. The opportunity to better capture this market through product development, enhanced tourism services and marketing is strong.

Enhanced tourism development offers regions such as the Fort St. James Forest District — where traditional resource dependant industries are experiencing a decline due to automation, soft markets and/or decreasing resource supply — yet one more opportunity to further diversify its economy.

Tourism is a resource based industry which is experiencing substantial growth. The 1995/96 BC visitor survey conducted by the Ministry of Small Business Tourism and Culture indicates that travellers are staying longer and spending more money when they travel within BC. Another key finding of the survey is that travellers are visiting more regions within BC. For the Fort St. James Forest District this means that more visitors are coming to the area. This increased tourism activity within the region translates into economic opportunities for the region. However, in order to fully benefit from this increase in tourism activity, tourism development must occur to provide the visitor with things to do while visiting the region. This in turn will encourage the visitor to stay longer within the region, resulting in an increase in tourism revenue. The benefits of enhanced tourism development in the Fort St. James Forest District will be realized through increased employment opportunities in the region, and a higher level of entrepreneurial and income-generating opportunities.

Outdoor, adventure travel and ecotourism is, by far, the fastest growing area of tourism, globally. In the last decade this form of tourism has generated a considerable shift in market interests, new types of products, and how countries and regions are positioning their marketing. In a major market study done for British Columbia, Alberta and Parks Canada[12], it was found that this market has tremendous potential for British Columbia and Alberta. It was also found that a critically strong attracting factor for ecotourists was to enjoy their experiences in relatively "natural settings".

Ecotourism is also a very lucrative component of tourism, since it attracts a higher-end market who are willing to pay a better price than average for quality experiences. The Fort St. James Forest District, with its attractive natural features, is in a prime position to benefit from this market surge.

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[12] HLA Consultants & The ARA Consulting Group Inc., *Ecotourism — Nature/Adventure/Culture: Alberta and British Columbia Market Demand Assessment*, January 1995.